BRIDGNORTH DISTRICT COUNCIL RETAIL STUDY – 2006 TO 2021

Bridgnorth District Council

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ticking all the right boxes

White Young Green

CONTENTS

1.0 SCOPE AND PURPOSE OF THE STUDY

1.1 Bridgnorth District Council has commissioned this Study from White Young Green Planning (WYG). The Study assesses the vitality and viability of Albrighton, Broseley, Bridgnorth, Much Wenlock and Shifnal (the five centres) and the future retail need in those centres over the period 2006 to 2021. The Study has regard to the advice on such assessments set out in Planning Policy Statement 6 (2005) 'Planning for Town Centres'.

1.2 The Study includes an in-depth analysis of the retail and leisure provision in the 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.

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

1.4 The purpose of this Study is to:

- Assess the quantitative 'need', or expenditure capacity, for further convenience and comparison retail and leisure floorspace in the five centres; in the first instance, the retail need should be met in the primary shopping area of the town centres, and then elsewhere in the town centres, and any leisure need should be met within the wider town centres;
- Assess any qualitative deficiencies that may exist in Bridgnorth District's existing retail and leisure provision;
- Assess the vitality and viability of the town centres;
- Assess the role of out of centre retailing in the Study area; and
- From the above, make broad recommendations on appropriate retail and leisure strategies, including considering the ability of commitments, allocations and sites currently coming forward to meet the identified capacity for additional floorspace.

1.5 Section 2 is a Statement of Methodology. The Study methodology is designed to allow comparison with the findings of the previous Bridgnorth Retail Study (1996), and some comparison of change over time is made with regard to retail and leisure patterns, as the 1996 Study was not based upon empirical research.

2 METHODOLOGY

Survey Data

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

Telephone Survey

2.2 A telephone survey of 500 households in the Bridgnorth Area, undertaken by NEMS Market Research in March 2006; the Survey Area is based upon the 1996 Bridgnorth Retail Study, defined by post-code sectors.

2.3 NEMS undertook the telephone survey in five survey zones. The survey area and survey zones are shown on the plan at **Appendix 1**. The survey zones and post-code sectors within the zones comprise:

1. Bridgnorth and Highley - WV15/5, WV15/6, WV16/4, WV16/5, WV16/6
2. Broseley and Much Wenlcok - TF12/5, TF13/6
3. Shifnal and Sheriffhales - TF11/8, TF11/9
4. Albrighton and Claverley - WV5/7, WV6/7, WV7/3
5. Rural South - DY12/3, DY14/0, DY14/8

2.4 The new data provide for analysis of current shopping patterns and some assessment of changes in shopping patterns over the period 1996 to 2006. The 2006 survey is designed to yield data on convenience and comparison shopping patterns and leisure activity in the Bridgnorth 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

2.5 In March 2006 NEMS conducted an in-street survey of 450 visitors to the towns comprising: 200 in Bridgnorth; 100 in Shifnal; 50 in Albrighton; 50 in Broseley and 50 in Much Wenlock.

2.6 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

2.7 The Retail Study is informed by a pedestrian flow survey undertaken by NEMS. NEMS recorded the pedestrian flow at a number of count points, to inform the vitality and viability assessments. The tabulated results of the pedestrian counts are included at **Appendix 4**.

Town Centre Business Surveys

2.8 Bridgnorth District Council, Staffordshire University and WYG conducted a survey of all commercial businesses in the town centres. The response rate was: Albrighton (26%); Bridgnorth High Town (33%); Bridgnorth Low Town (26%); Broseley (33%); Much Wenlock (53%); and Shifnal (45%). A tabulated summary of findings is included at **Appendix 5**.

Assessing the 'Vitality and Viability' of the Town Centre

2.9 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 land use plan[1] is used to assess the diversity of uses in the town centres;
- **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations**: WYG includes all retail and leisure floorspace in the Bridgnorth 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 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 FOCUS reports for outstanding retailer demand (**Appendix 6**);
- **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;
- **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 in-street surveys;
- **Accessibility**: from in-street surveys and visitor survey responses;
- **Customer and residents' views and behaviour**: from the surveys listed above;
- **Perception of safety and occurrence of crime**: from in-street surveys and visitor /business survey responses; and

[1] Experian land use plan is available only for Bridgnorth. OS based land use plans are used for the other centres.

- **State of the City/town centre environmental quality**: from in-street surveys and visitor/business survey responses.

2.10 The assessment of vitality and viability was undertaken by various means, including:

- Field work observations of the town centre;
- Information derived from the Bridgnorth GOAD plan and centre report and land use plans completed for the other centres (**Appendix 7**);
- Perceptions of town centre environment, accessibility, safety and potential for improvement, from in-street surveys; and
- Commercial yields from Valuation Office Agency (VOA) data and local agents.

2.11 The completed vitality and viability assessments are included at **Appendix 8**.

Calculating Quantitative 'Capacity'

Retail - Convenience and Comparison Goods

2.12 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]***

2.13 Household survey data is used to calculate the market shares[2] for the town centres, and freestanding destinations in the Bridgnorth 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 9**. The capacity assessment is undertaken using published county growth rates from Shropshire County Council.

Expenditure from Outside of the Study Area

2.14 The Survey area adopted in the Retail Study is drawn broadly, so as to include the great majority of shoppers who use destinations in Bridgnorth 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.

[2] Market share: the proportion of expenditure directed to a centre/retail destination within any given survey area.

2.15 The proportion of destinations' convenience and comparison turnovers drawn from outside of the Survey Area cannot be quantified. An assumption can be made, although caution should be exercised. The Retail Study makes an allowance for a small proportion of expenditure in-flow from outside of the Study Area. For guidance only, in light of the Survey Area adopted, the in-flow to Bridgnorth town centre is very unlikely to be in excess of 10% of total turnover in the comparison retail sector. In respect of convenience retailing, in-flow is likely to be no more than 5%.

Capacity Projections

2.16 Capacity figures are given for 2011 as this is five years from the base date of the Study; the time span advocated at paragraph 3.10 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]***

2.17 The 2011 capacity figure is a useful guide as to whether Bridgnorth District Council needs to allocate, or retain existing allocated sites, for new retail development as part of the process of preparing a Development Plan Document. 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 it covers.

2.18 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 the town centre, prior to other sites being considered; for these other sites to be acceptable it will be necessary to demonstrate that there are no alternative sites within the town centre, to meet any identified need, where centres are in the catchment area of a proposed development.

2.19 The advice is that medium and longer term capacity (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

2.20 Market share is calculated by applying the survey results, by sub-zone, to local expenditure estimates commissioned from MapInfo. 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).

2.21 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

2.22 In estimating future 'capacity', the spending power of the catchment population is projected forward on the basis of actual growth rates for the period 2003 to 2004 and MapInfo/Oxford Economic Forecasting (OEF) projections thereafter[3]. These forecasts are based partly on past trends, but also upon expected changes in other economic variables, according to historic relationships. The MapInfo Information Brief 05/2 considers that the most statistically robust estimate of growth in the long term, in the convenience goods sector, is 0.9%. In the comparison goods sector a growth rate of 4.3% is advised.

2.23 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, as 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. This Study adopts conservative estimates for the growth in per caput 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

2.24 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

[3] The Mapinfo Claritis data used gives per caput spending on convenience and comparison goods at 2003. Actual growth rates in per caput spending are available for 2003 to 2004 and thereafter Mapinfo/OEF forecast growth rates are used

applied to the total expenditure available at 2010, 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.

Sequential Approach

2.25 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]***

2.26 Bridgnorth 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 District and growth in spending elsewhere in the District should be satisfied by new retail facilities in the other towns. It is in the interests of social inclusion that the broader growth effected in the urban area be directed to the town centres rather than to less central sites, unless there is good reason for this.

2.27 It is an optimum aim for the town centres to attract all of the expenditure growth, which, when applying current market share. This could come about through significant qualitative improvements in the current retail offer; this should be an aspiration of the Council.

Leisure

2.28 The Leisure assessment is undertaken in four key commercial leisure sectors: Bingo; Cinema; Health and Fitness; and Ten-Pin Bowling on a District-wide basis. The preferred location for commercial leisure development is Bridgnorth town centre, as the principal centre in the District.

2.29 Household survey data is used to assess the propensity for residents in the Survey area to undertake the four leisure activities assessed and the market share[4] of the District. The leisure patterns in the Survey Area are recorded in the tables at **Appendix 10**.

[4] Market share: the proportion of patronage at any centre/destination within any given survey area

2.30 The leisure assessment uses the same population scenarios as the retail assessment, namely published country growth rates using data from Shropshire County Council.

2.31 WYG has devised a robust methodology for calculating the need for additional commercial leisure provision. The assessment works in a different way to that undertaken for retailing, for two reasons:

- Projecting forward current patronage rates will not generate a quantitative need in the same way that projecting forward current market share in the convenience and comparison retail sectors does. Quantitative need in the commercial leisure sector is derived from increased participation rates; and
- In the leisure sector, qualitative deficiency, resulting in a latent demand, must be taken into account. For a proportion of the population who do not partake in leisure activities, such as Bingo, Cinema, Health and Fitness or Ten-Pin Bowling, the reason behind this may be an absence of provision.

2.32 WYG assesses the participation rates in the Study Area against provision and the requisite provision at national average participation rates and from this calculates whether there is a deficiency in facilities. The extent of any current deficiency, and the margin between requisite provision (at a national average) and actual provision will determine the need for new provision in the Bridgnorth area, the capacity for new facilities and the need to identify sites to accommodate them.

2.33 Capacity figures are given for 2011, five years from the base date of the Study, as advised by PPS6. The 2011 figure is a guide as to whether the Council needs to allocate, or retain existing allocated sites, for new commercial leisure development as part of the emerging Development Plan Document. The Study is an important material consideration in Development Control decisions.

2.34 As with retail, assessing longer-term capacity (in this Study over the periods to 2016 and 2021) should be viewed with some caution and it is not intended that any need over this period be satisfied on out of centre sites (unless there is good reason to do so) as this may prejudice future opportunities in the town centre that are yet to become available, but may do so beyond 2011.

2.35 For the Health and Fitness centre, capacity is calculated and a straightforward ratio of potential participation amongst the Survey Area population compared with the population to support a Health and Fitness Centre; the assessment is geared towards large-format health and fitness centres, usually with multiple activities, which will have a broadly similar requirement in terms of catchment population. In the other sectors (Bingo, Cinema and Ten

Pin Bowling) capacity is calculated in terms of the number of potential annual visits by the Survey Area population and the population/visits required to support such facilities.

2.36 For Ten-Pin Bowling, capacity is assessed in terms of the number of lanes that could be potentially supported. In the Cinema sector, the same assessment is made in terms of the number of screens that could potentially be supported. For Heath and Fitness Clubs and Bingo Halls, capacity is expressed in terms of the number of facilities that could potentially be supported.

2.37 Bridgnorth is the principal town and should be the preferred location for new commercial leisure development. It is in the interests of social inclusion that any broader capacity effected in the urban area is directed to the town centre rather than out of centre locations, unless there is good reason for this.

2.38 It is an optimum aim for the District’s town centres to attract any new retail facilities that are developed to meet any qualitative need, qualitative need and latent demand for participation.

Qualitative Need

2.39 In addition to any quantitative need, there may also be a qualitative need for new retail or leisure 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 and leisure expenditure is leaking from the survey 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 and leisure floorspace takes into account any qualitative deficiency in existing provision, in advising appropriate strategies for future development.

3 SHOPPING IN BRIDGNORTH

The Telephone Survey

3.1 The Survey Area is shown on the plans at **Appendix 1**.

3.2 The analyses of the telephone survey exclude the ‘don’t know’ and ‘don’t buy’ responses.

3.3 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 72.5% of spending is directed to main convenience shopping and the residual is directed to top-up shopping; this is based upon Mapinfo Claritis demographic information for the Survey Area. There is no set rule for this, but the WYG estimates are reflective of standard practice in the completion of retail studies.

3.4 A similar methodology is used for comparison shopping. It is assumed that 60% of spending is on non-bulky items and that this is divided between clothing and footwear (26%) and household goods (34%). 40% is directed to bulky goods spending, divided into DIY (9%), electrical (15%) and furniture and carpets (16%). The proportion of expenditure directed to non bulky, bulky and DIY goods shopping is informed by national data. Again, there is no set rule for this but WYG’ estimates are reflective of standard practice in the completion of retail studies.

3.5 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 9**) 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.

The In-street Survey Area

3.6 NEMS conducted an in street survey of 450 visitors, comprising: 200 interviews in Bridgnorth, 100 interviews in Shifnal; and 50 interviews each at Albrighton, Broseley and Much Wenlock.

3.7 Respondents were asked about their activities in the town centres, frequency of visit, convenience and comparison shopping patterns, leisure activities, mode of travel and perceptions of the destination on a range of criteria.

3.8 The importance of undertaking in-street surveys is that, unlike the household telephone surveys, respondents are actively using the town centres. The answers are therefore related to the town centres themselves, rather than shopping patterns in general. They serve to assess the vitality and viability of the town centre, with respect to its use, people's perceptions and the facilities it has to offer. In contrast, the household survey is used to identify the proportion of residents in the Study Area that use retail and leisure destinations.

Comparison Shopping

Non Bulky Goods - Clothing and Footwear Goods[5]

The market share of Bridgnorth in the Clothing and Footwear sector is 5.7%; the market share of Shifnal is 0.5% and the market share of Much Wenlock 0.1%. The principal leakage to destinations to outside of the survey area is to: Telford (45.9%); and Wolverhampton (15.2%).

In the Bridgnorth and Highley area (Zone 1): the market share of Bridgnorth is 11.2%; there is no expenditure directed to Highley; and the leakage is principally to Telford (40.8%) and Kidderminster (15.3%). In the Broseley and Much Wenlock area (Zone 2): the market share of Much Wenlock is 1.1%; there is no expenditure directed to Broseley; and the leakage is principally to Telford (67.4%); and Shrewsbury (13.7%). In the Shifnal area (Zone 3): the market share of Shifnal is 1.0%; leakage is primarily to Telford (78.0%). In the Albrighton area (Zone 4): no expenditure is directed to Albrighton; leakage is primarily to Telford (41.6%); and Wolverhampton (34.4%).

In general terms, Bridgnorth is not serving well the clothing and footwear shopping needs of the District's population. Market share is greatest (11.2%) in the Bridgnorth area and tails off quickly outside of the immediate Bridgnorth area. Higher order centres in authority areas surrounding Bridgnorth (including Kidderminster, Shrewsbury, Telford and Wellington) attract 89.8% of clothing and footwear spending.

Non Bulky Goods - Other Household Goods[5]

The market share of Bridgnorth in the other household goods sector is 15.5%; the market share of Much Wenlock is 0.5%; the market share of Shifnal is 0.4%; and the market share of Broseley is 0.1%. The principal leakage to destinations to outside of the survey area is to: Telford (36.6%); and Wolverhampton (9.9%).

In the Bridgnorth and Highley area (Zone 1): the market share of Bridgnorth is 38.5%; there is no expenditure directed to Highley; and the leakage is principally to Telford (25.6%) and Kidderminster (12.8%). In the Broseley and Much Wenlock area (Zone 2): the market share of Much Wenlock is 3.8%; the market share of Broseley is 1.3%; and the leakage is principally to Telford (56.3%); and Shrewsbury (13.7%). In the Shifnal area (Zone 3): the market share of Shifnal is 2.4%; leakage is primarily to Telford (70.6%). In the Albrighton area (Zone 4): no expenditure is directed to Albrighton; leakage is primarily to Telford (33.7%); and Wolverhampton (27.3%).

In common with the clothing and footwear sector, Bridgnorth is not serving well the household goods shopping needs of the District's population. Market share is greatest (38.5%) in the Bridgnorth area and tails off quickly outside of the immediate Bridgnorth area. Higher order centres in authority areas surrounding Bridgnorth (including Kidderminster, Shrewsbury, Telford and Wellington) attract 66.3% of clothing and footwear spending.

[5] Statistics factor-out don't do/varies responses

Overall Non Bulky Shopping Patterns

3.9 Market Shares of the town centre and other key centres, from the whole of the Survey Area, in the non bulky sector are[5]:

- Albrighton – **0.0%;**
- Bridgnorth – **10.7%;**
- Broseley –- **0.1%;**
- Highley – **0.0%;**
- Much Wenlock – **0.3%;**
- Shifnal – **0.4%;**
- Kidderminster – **7.8%;**
- Shrewsbury – **3.5%;**
- Telford – **41.5%; and**
- Wolverhampton – **13.0%.**

Bulky Goods / DIY Goods[5]

The market share of Bridgnorth in the bulky goods sector is 11.0%; the market share of Shifnal is 1.3%; the market share of Albrighton is 0.5%; and the market share of Much Wenlock is 0.1%. The principal leakage to destinations to outside of the survey area is to: Telford (35.6%); Wolverhampton (15.8%); and Kidderminster (11.5%).

In the Bridgnorth and Highley area (Zone 1): the market share of Bridgnorth is 27.5%; there is no expenditure directed to Highley; and the leakage is principally to Telford (29.1%) and Kidderminster (20.0%). In the Broseley and Much Wenlock area (Zone 2): the market share of Much Wenlock is 2.1%; the market share of Broseley is 1.0%; and the leakage is principally to Telford (57.3%). In the Shifnal area (Zone 3): the market share of Shifnal is 9.3%; leakage is primarily to Telford (65.7%). In the Albrighton area (Zone 4): 1.5% of expenditure is directed to Albrighton; leakage is primarily to Telford (27.9%); and Wolverhampton (42.3%).

In common with the non-bulky sector, Bridgnorth District is not serving well the bulky goods shopping needs of the District's population. Market share is greatest (Bridgnorth town – 27.5%) in the Bridgnorth area and tails off quickly outside of the immediate Bridgnorth area. Higher order centres in authority areas surrounding Bridgnorth (including Kidderminster, Shrewsbury, Telford and Wellington) attract 80.5% of bulky goods spending.

3.10 The Household Survey records the following bulky goods (excluding DIY goods) market shares in the Survey Area[5]:

- Albrighton – **0.7%;**
- Bridgnorth – **9.9%;**
- Broseley –- **0.0%;**

[5] Statistics factor out don't do/varies responses

- Highley – **0.0%;**
- Much Wenlock – **0.0%;**
- Shifnal – **0.9%;**
- Kidderminster – **10.7%;**
- Shrewsbury – **5.6%;**
- Telford – **34.0%; and**
- Wolverhampton – **16.8%.**

3.11 The Household Survey records the following DIY goods market shares in the Survey Area[5]:

- Albrighton – **0.0%;**
- Bridgnorth – **15.0%;**
- Broseley –- **1.1%;**
- Highley – **0.0%;**
- Much Wenlock – **0.0%;**
- Shifnal – **1.7%;**
- Kidderminster – **14.4%;**
- Shrewsbury – **0.6%;**
- Telford – **42.0%; and**
- Wolverhampton – **12.6%.**

The Role of Comparison Stores in the District

3.12 The comparison survey findings suggest that the town centres in the District are not seen as principal destination for comparison shopping.

3.13 In the clothing and footwear sector, nearly 80% of spending is directed to destinations outside of the District. In the household goods sector, the leakage is two-thirds of all spending. The pattern is repeated in the bulky goods sector, where 85% of spending on furniture and carpets, 77% of spending on electrical items and 80% of spending on DIY goods is directed to destinations outside of the District. The household survey indicates that, in contrast with higher-order centres in neighbouring authorities, the comparison retail provision in the Bridgnorth area are not being used currently by any meaningful proportion of the shopping public.

[5] Statistics factor out don't do/varies responses

Convenience Shopping Patterns

Main Convenience Shopping

Convenience-shopping patterns show a greater degree of dispersal than comparison patterns. The principal main convenience shopping destination in the Study Area is the Sainsbury's at Bridgnorth. Other main convenience shopping trips are undertaken principally at destinations outside of Bridgnorth District. Other stores in the District perform a more localised top up convenience shopping role.

In the Study area, the main convenience market share of Bridgnorth is 32.4% of which the Sainsbury's accounts for 27.0% overall. The leakage from the Study Area is 63.6% of which the stores in Telford account for 31.0% and stores in Kidderminster 11.0%.

In Bridgnorth and Highley (Zone 1): the main-convenience market share of stores in Bridgnorth is 63.2%; no main-convenience spending is directed to Highley; and the leakage from the Study Area is 36.8%. In the Broseley and Much Wenlock area (Zone 2): the main convenience market share of Much Wenlock is 3.8%; the main convenience market share of Broseley is 1.9%; and the leakage from the Study Area is 76.0%. In the Shifnal area (Zone 3): the main convenience market share of Shifnal is 14.8%; and the leakage from the Study Area is 85.2%. In the Albrighton area (Zone 4): the main convenience market share of Albrighton is 3.2% and the leakage from the Study Area is 70.7%.

The Sainsbury's convenience store is the only large format convenience store in the District. It performs a main-convenience shopping role for residents of Bridgnorth, Highley, Albrighton and, to some extent, Broseley and Much Wenlock. There is a significant leakage of main-convenience expenditure to destinations outside of the District.

3.14 The pattern of main convenience shopping in the Study Area recorded by the Household Survey is:

▪ **Albrighton**	**1.1%**;
▪ **Bridgnorth**	**32.4%**;
▪ *Coop, Listley Street*	*1.1%;*
▪ *Sainsbury's, Whitburn Street*	*27.0%;*
▪ *Somerfield, Mill Street*	*3.8%;*
▪ *Tesco Express, High Street*	*0.5%;*
▪ **Broseley**	**0.2%;**
▪ **Highley**	**0.0%;**
▪ **Much Wenlock**	**0.5%:**
▪ **Shifnal**	**2.0%;**
▪ **Kidderminster**	**11.0%;**
▪ **Shrewsbury**	**2.3%;**
▪ **Telford**	**31.0%; and**
▪ **Wellington**	**3.0%.**

Top-up Shopping

The Household Survey also recorded top up convenience shopping patterns. Top-up convenience shopping is more localized.

The principal top-up shopping destination in the Study Area is Bridgnorth town centre (33.2%) of which the Sainsbury's accounts for 16.7% overall. Other important destinations for top up convenience shopping trips are Albrighton (16.7%); Shifnal (10.1%); and destinations outside of the District (23.7%). Of the leakage from the Study area, stores in Kidderminster account for 2.5% overall and stores in Telford 3.2% overall.

In Bridgnorth and Highley (Zone 1): the top-up market share of stores in Bridgnorth is 73.0%; 14.4% of top-up spending is directed to Highley; and the leakage from the Study Area is 9.6%. In the Broseley and Much Wenlock area (Zone 2): the top up convenience market share of Much Wenlock is 33.3%; the top up convenience share of Broseley is 46.2%; and the leakage from the Study Area is 12.8%. In the Shifnal area (Zone 3): the top up convenience market share of Shifnal is 80.0%; and the leakage from the Study Area is 17.5%. In the Albrighton area (Zone 4): the top up convenience market share of Albrighton is 46.4% and the leakage from the Study Area is 30.0%.

The District performs well in the top-up convenience shopping sector, with the needs of each sub area of the District met, in the main, by stores within those centres. There is a limited leakage of top up convenience expenditure to destinations outside of the District.

3.15 Top-up shopping patterns in the Survey Area as a whole are:

- **Albrighton** **16.7%**;
- **Bridgnorth** **33.2%**;
- *Coop, Listley Street* *1.3%;*
- *Sainsbury's, Whitburn Street* *16.7%;*
- *Somerfield, Mill Street* *3.5%;*
- *Tesco Express, High Street* *0.0%;*
- **Broseley** **5.7%;**
- **Highley** **5.1%;**
- **Much Wenlock** **4.7%;**
- **Shifnal** **10.1%;**
- **Kidderminster** **2.5%;**
- **Shrewsbury** **0.0%;**
- **Telford** **3.2%; and**
- **Wellington** **0.0%.**

3.16 The overall pattern of convenience shopping, combining the main-convenience and top up shopping findings, is:

- **Albrighton** **5.4%**;
- **Bridgnorth** **32.6%**;
- *Coop, Listley Street* *1.1%;*
- *Sainsbury's, Whitburn Street* *24.2%;*
- *Somerfield, Mill Street* *3.7%;*
- *Tesco Express, High Street* *0.3%;*

- **Broseley** **1.8%;**
- **Highley** **1.4%;**
- **Much Wenlock** **1.6%;**
- **Shifnal** **4.3%;**
- **Kidderminster** **8.7%;**
- **Shrewsbury** **1.6%;**
- **Telford** **23.3%; and**
- **Wellington** **2.2%.**

The Role of Convenience stores in the District

3.17 The large format Sainsbury's superstore in Bridgnorth trades well. The turnover of the store (£27.9m) is significantly higher than would be the case if the store traded at the company's average sales density. The turnover of the store at company average sales density would be £12.2m. The household survey turnover of the Somerfield convenience store in Low Town is £1.0m greater than would be the case if the store traded at company average sales density.

3.18 The Sainsbury's in Bridgnorth plays and important role in meeting the main-convenience shopping needs of residents living in the town and also Highley and Albrighton. Other stores in the town centre and elsewhere in the District play a limited role in main convenience shopping. Although stores throughout the District perform a top-up shopping role, almost two-thirds of main convenience shopping expenditure (63.6%) is directed to destinations outside of it. Large format convenience stores in Telford, Kidderminster and elsewhere outside of the District are drawing a significant proportion of the convenience retail spending generated in the District. There is a qualitative deficiency in convenience retail provision in the District.

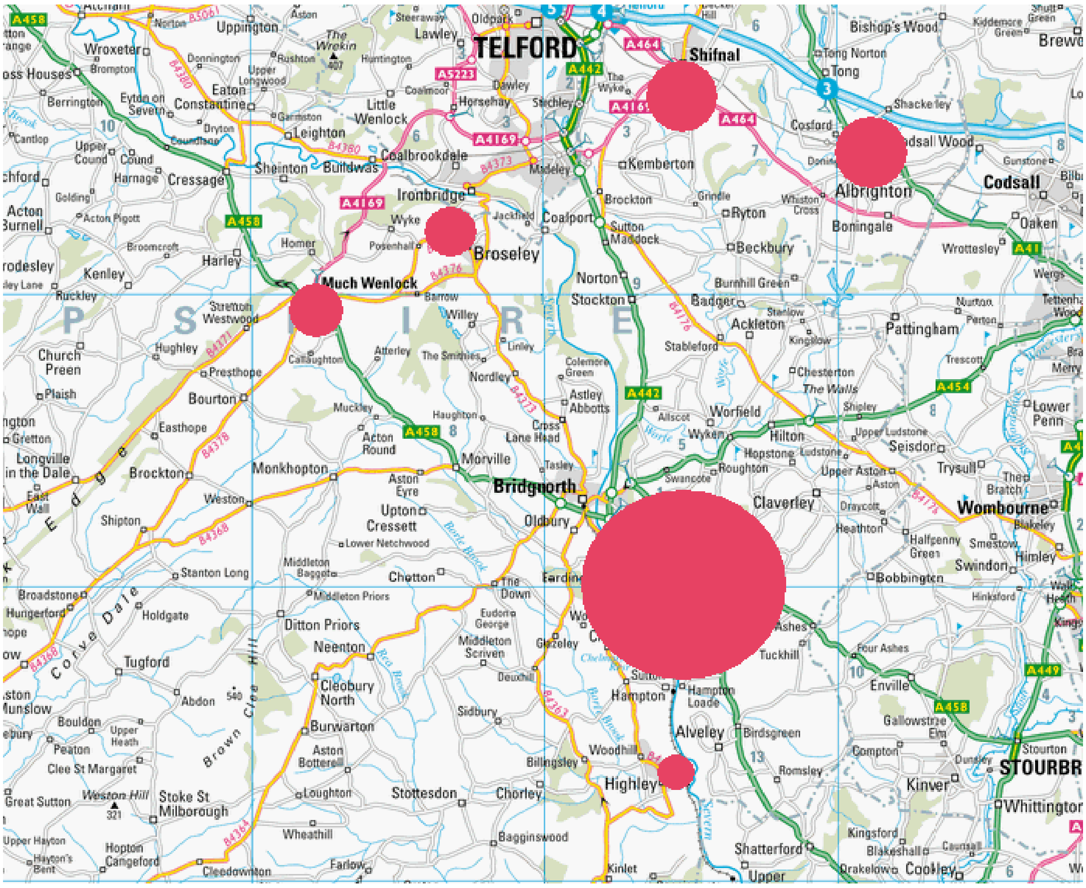
Retail Hierarchy

3.19 The total turnover of the six largest centres in the District is £84.3m (convenience and comparison goods). Table 3.1 summarises the hierarchy, turnover and the market share in the survey area.

FIGURE 3.1: HIERARCHY AND MARKET SHARE

CENTRE	**CONVENIENCE £(m)**	**COMPARISON £(m)**	**TOTAL £(m)**	**MARKET SHARE (%)**
1. Bridgnorth	37.6	26.7	64.3	76.3
2= Shifnal	4.9	1.8	6.7	7.9
2= Albrighton	6.2	0.5	6.7	7.9
4. Broseley	2.1	0.4	2.5	3.0
5. Much Wenlock	1.9	0.5	2.4	2.8
6. Highley	1.7	0.0	1.8	2.0
TOTAL	**54.4**	**29.9**	**84.3**	**100**

FIGURE 3.2: HIERARCHY AND MARKET SHARE



3.20 Bridgnorth is the dominant centre in the District. Bridgnorth has the greatest convenience and comparison goods turnover of the six largest centres in the District and accounts for over two-thirds of the shopping expenditure directed to the six principal towns. Shifnal and Albrighton account for 6.7% each of the shopping expenditure directed to the six largest centres. The turnover of Shifnal comprises approximately three quarters comparison and one-quarter convenience. The turnover of Albrighton is almost exclusively convenience spending, which accounts for over 90% of the retail turnover in the centre. Broseley accounts for 3.0% of the retail spending directed to the centres, of which 84% is accounted for by convenience spending. The 2.8% share of Much Wenlock is approximately three-quarters comparison spending and one-quarter convenience spending. The smallest centre, in retail turnover terms, is Highley. Its 2.0% share of the six main centres' turnover is accounted for entirely by spending on convenience goods.

3.21 The centres in the District serve principally convenience shopping needs, although only Bridgnorth is used by a significant percentage of the survey area population for bulk food shopping. Bridgnorth attracts comparison goods spending from within the survey area, but the great majority of spending is directed to higher order centres outside of the survey area such as: Kidderminster; Shrewsbury; Telford; and Wolverhampton.

4 LEISURE IN BRIDGNORTH DISTRICT

Introduction

4.1 In addition to an assessment of convenience and comparison retail shopping patterns in the District, this Study considers current provision of and additional need for commercial leisure provision: cinema; ten-pin bowling; bingo halls; and health and fitness clubs. **Appendix 11** summarises the current commercial leisure provision in Bridgnorth District.

Leisure Provision

Cinema

4.2 There is a three-screen cinema in the District, in Bridgnorth (the Majestic cinema). The nearest multi-screen cinemas are in Telford and Wolverhampton and there is an arts cinema in Kidderminster.

Ten-Pin Bowling

4.3 The District does not have a ten-pin bowling facility. The nearest ten-pin bowling facilities are the Telford Superbowl and two AMF facilities (Strykers and Bowling Express) in Wolverhampton.

Bingo Halls

4.4 The District does not have a large format bingo hall. The nearest facilities to the District are: the Gala Club Shrewsbury; two facilities in Wolverhampton (Mecca and Ashmore); and three facilities in Telford (Globe, Mecca and The Royal).

Health and Fitness Clubs

4.5 There are two registered membership-based health and fitness clubs in the Bridgnorth area; one of these is in Bridgnorth (The Bridgnorth Health and Fitness Club) and the other in Shifnal. Larger fitness clubs are located in Shrewsbury, Telford and Wolverhampton.

Leisure Activity

4.6 The NEMS household survey included questions on the use of centres in the Study area for: Health and Fitness; Entertainment; and Nightlife. The findings of the research are summarised at Table 2 of **Appendix 10**; Table 2 uses the findings of the household survey to identify the catchment population in the three core leisure areas of the town centres in the District.

Health and Fitness

4.7 The household survey identifies that the last centre visited by residents of the District for health and fitness activity (of the 40% of residents who undertake such activity) is:

- Albrighton 0.0%;
- Bridgnorth 20.0%;
- Broseley 0.0%;
- Highley 3.0%;
- Much Wenlock 1.5%:
- Shifnal 8.5%;
- Kidderminster 4.5%;
- Shrewsbury 2.0%;
- Telford 19.5%; and
- Wolverhampton 4.0%.

4.8 Bridgnorth is the principal destination in the District for health and fitness activity. In the Bridgnorth and Highley area, 43% of residents partake in health and fitness activity and of these 60.5% use Bridgnorth.

4.9 Bridgnorth also draws from the Broseley, Much Wenlock, Shifnal and Albrighton areas. The other centres in the District are not used for health and fitness activity; Telford attracts a significant proportion of health and fitness activity from the Broseley and Much Wenlock (44%) and Shifnal and Sheriffhales area (33%).

4.10 Table 3 at **Appendix 10** projects forward health and fitness club use on the basis of the average annual growth rote in membership levels (1994 to 2003) of 2.5% per annum as defined by Mintel. The need for additional health a fitness provision is considered in Section 5.

4.11 A small proportion of residents in the District undertake health and fitness activity on a daily basis (2.5%). The greatest proportion of residents who undertake health and fitness activity do so two or three times a week (21.2%) or at least once a week (35.4%). 80% of those partaking in health and fitness activity, do so at least once a month.

Entertainment

4.12 The household survey identified that three-quarters of the population in the District uses centres for entertainment (theatre, cinema, restaurant etc). 28% of residents who use centres for entertainment purposes use centres within the District, with the remainder travelling to destinations outside of it. The proportion of people using centres for entertainment activity is:

- Albrighton 0.0%;
- Bridgnorth 21.4%;
- Broseley 1.6%;
- Highley 0.0%;
- Much Wenlock 1.0%;
- Shifnal 3.6%;
- Kidderminster 2.9%;
- Shrewsbury 5.4%;
- Telford 21.7%; and
- Wolverhampton 15.0%.

4.13 Bridgnorth is the principal destination in the District for entertainment, attracting 21.4% of residents who seek entertainment in centres. Shifnal attracts 3.6% of those who seek entertainment in centres and Broseley attracts 1.6%. Bridgnorth is the only well-patronaged destination in the District for entertainment. Outside of the District, Telford attract 21.7% of residents who seek entertainment in centres and Wolverhampton attracts 15%.

4.14 In the Bridgnorth and Highley area, the market share of Bridgnorth increases to 62% and the town draws residents from throughout the District. Entertainment facilities in Telford draw significant proportions of the population from Broseley and Much Wenlock, Shifnal and Sheriffhales and Albrighton and Claverely. Wolverhampton draws 43% of residents from the Albrighton and Claverley area who seek entertainment in town centres.

4.15 Few residents in the Bridgnorth area visit centres for entertainment more frequently than once a fortnight (11.7%), with most visiting centres for entertainment with a frequency of between once a fortnight and once every two months (54.8%).

4.16 The need for additional health an entertainment provision is considered in Section 5.

Nightlife

4.17 The household survey identifies that just over 52% of residents in Bridgnorth district visit centres for nightlife (bars, pubs and nightclubs). Of this 52% of the resident population, approximately 50% use centres within the District and 50% use centres outside of it. The proportion of people using centres for nightlife activity is:

- Albrighton 1.6%;
- Bridgnorth 24.8%;

- Broseley 5.2%;
- Highley 1.2%;
- Much Wenlock 3.6%;
- Shifnal 11.6%;
- Kidderminster 2.0%;
- Shrewsbury 6.4%;
- Telford 2.8%; and
- Wolverhampton 14.8%.

4.18 Bridgnorth is the principal destination for nightlife, attracting a quarter of all residents of the District who seek such activity. Other destinations attracting a significant proportion of the participating population are Broseley and Shifnal in the District and Shrewsbury and Wolverhampton outside of it. Kidderminster and Telford are identified by only a small proportion of the resident population as centres for nightlife.

4.19 In the Bridgnorth and Highley area, Bridgnorth attracts two-thirds of all residents who seek nightlife activity. Bridgnorth also draws a significant proportion of residents from Broseley and Much Wenlock. Shifnal attracts a significant proportion of residents from its immediate area. Wolverhampton attracts a significant proportion of residents from the Albrighton and Claverley area. In the rural south, the nightlife in Cleobury Mortimer attracts 40% of residents who seek such activity.

4.20 In general terms, residents of the District who seek nightlife activity visit centres for such activity at least once a month (75%), with 43% partaking in such activity at least once a week.

5 BRIDGNORTH RETAIL AND LEISURE ASSESSMENT

Retail Capacity

Overview

5.1 The statistical tables at **Appendix 9** use the findings of the Household Survey to calculate the capacity for new retail floorspace in Bridgnorth District, in the convenience and comparison sectors, over the periods to 2011, 2016 and 2021 to give a short, medium and long term views of capacity.

5.2 The Local Plan covers the period until 2011. The longer term capacity is relevant in the context of the emerging Local Development Framework. However, PPS6 advises that, in considering applications for retail development, local planning authorities should project capacity 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.

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

5.4 The quantitative need for new floorspace is derived from growth in spending power, as a result of year-on-year growth in per caput 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 capacity figures to account for these floorspace efficiencies. No adjustment is made in respect of food retailing.

5.5 Growth in expenditure pro-rata to the current market shares of edge-of-centre and out of centre retail facilities is aggregated to the capacity identified by centre. 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.

*Quantitative Retail Capacity – **Albrighton***

5.6 Table 5.1 sets out the convenience and comparison retail capacity for Albrighton 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 5.1: QUANTITATIVE CAPACITY – ALBRIGHTON TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE BRIDGNORTH AREA)*

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
AT 2006	4.0	800		
BY 2011	4.9	980	0.1	29
BY 2016	5.5	1,100	0.2	58
BY 2021	5.7	1,140	0.4	116

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

Convenience Goods

5.7 In the short term, there is capacity for a modest increase in convenience retail floorspace. The capacity identified would support a small to medium sized convenience store trading at a sales density of £5,000/sq. m. In the medium to long term, there is capacity for a more substantial, medium-sized, convenience store, of up to 1,100 sq. m (net) at 2016, dependent upon the type of proposal that comes forward.

5.8 There are no extant commitments that would meet the capacity identified in the short to medium term.

Comparison Goods

5.9 There is capacity for limited expansion of comparison retail floorspace in Albrighton in the short, medium and long term; the capacity in the medium to long term could provide for up to 60 sq. m of new floorspace that could be provided as two new retail units of 30 sq. m (net) each.

*Quantitative Retail Capacity - **Bridgnorth***

5.10 Table 5.2 sets out the convenience and comparison retail capacity for Bridgnorth 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 5.2: QUANTITATIVE CAPACITY – BRIDGNORTH TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE BRIDGNORTH AREA)*

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
AT 2006				
BY 2011	2.1	210-420	4.4	1,257
BY 2016	4.1	410- 820	10.3	2,943
BY 2021	6.5	650-1,300	18.0	5,142

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
*factors in a 1.5% floorspace efficiency for existing comparison town centre floorspace

Convenience Goods

5.11 In the short term, there is capacity for a limited increase in convenience retail floorspace or extension to existing provision. At a sales density of £5,000/sq. m, this would provide for a foodstore of 420 sq. m. The immediate capacity identified would support a small convenience store trading at a sales density of £5,000/sq. m. An extension to the town's Sainsbury's store could increase the sales area by 482 sq. m. A sales area of 482 sq. m would realise an additional turnover in the order of £4.7m, of which it is likely that £4.5m would be drawn within the survey area. On this basis, there is no quantitative need for additional food retail floorspace until after 2016, provided that the Sainsbury's extension comes forward.

5.12 In the long term, there is capacity for additional convenience retail provision over and above the existing commitment. At 2021, the expenditure available would support a foodstore of some 400 sq. m (net), trading at a sales density of £5,000/sq. m, taking into account the Sainsbury's commitment.

5.13 In light of the Sainsbury's extension, there is no quantitative need for additional food retail floorspace in the short to medium term. There is a limited quantitative need for additional convenience retail floorspace in the long term.

Comparison Goods

5.14 Table 5.2 identifies capacity for considerable additional comparison retail floorspace in Bridgnorth in the short, medium and long term; the capacity in the medium to long term is substantial.

5.15 Over the period to 2011, there is scope for an additional 1,257 sq. m (net) of comparison goods floorspace, trading at an average sales density of £3,500/sq. m; a sales density which is common to the trading performance of a small town centre that is vital and viable. The identified capacity would support a substantial expansion in town centre retail activity. However, the capacity is accounted for by existing commitments.

5.16 There are three commitments, potentially, for comparison retail development in Bridgnorth: a non-food store of 2,487 sq. m (gross)/1,990 sq. m (net); assuming net:gross ratio of 80% and excluding an ancillary garden centre of 929 sq. m. An extension to the existing Sainsbury's store of 482 sq. m (maximum sales area); and 225 sq. m (gross)/180 sq. m (net) of open Class A1 retail floorspace. The combined turnover of these commitments could be in the order of £11.4m of which £9.7m is likely to be drawn from within the survey area.

5.17 At 2016, there is a residual £0.6m available to new floorspace, which would support a development of 171 sq. m at a sales density of £3,500/sq. m.

5.18 The capacity over the periods to 2016 and 2021 provides scope for a further expansion of town centre retail floorspace; of up to 2,371 sq. m at 2006. If the three commitments come forward for comparison retail development, then there is no requirement for any additional non-food retail floorspace until 2015.

*Qualitative Retail Capacity – **Overtrading in Bridgnorth***

5.19 In respect of food goods in Bridgnorth, Table 5.3 adjusts the need figures to take account of qualitative need, by factoring-in the trading performance of existing floorspace. Overtrading/undertrading of existing floorspace is calculated by comparing the survey-derived turnover with the turnover that would be expected if the food retail stores traded at company average sales densities.

TABLE 5.3: QUANTITATIVE AND QUALITATIVE CAPACITY – BRIDGNORTH TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE BRIDGNORTH AREA)*

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
AT 2006	16.7	1,670-3,340		
BY 2011	18.8	1,880-3,760		
BY 2016	20.8	2,080-4,160		
BY 2021	23.2	2,320-4,640		

Includes expenditure derived through population and per caput growth in spending (from Table 5.2) in addition to overtrading.
Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m

5.20 The overtrading of existing stores in the town (principally the Sainsbury's superstore) suggests that there is £16.7m of surplus expenditure available to new floorspace. From this identified capacity, it is appropriate to subtract the potential turnover of the Sainsbury extension (£4.5m from within the survey area), which leaves a residual £12.2m available to new floorspace. This would support a store of 1,220 sq. m net trading at a sales density of £10,000/sq. m. By 2011, the capacity increases to £14.3m, which would support a store of 1,430 sq. m trading at a sales density of £10,000/sq. m.

*Quantitative Retail Capacity - **Broseley***

5.21 Table 5.3 sets out the convenience and comparison retail capacity for Broseley 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 5.4: QUANTITATIVE CAPACITY – BROSELEY TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE BRIDGNORTH AREA)*

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
AT 2006	0.0	-		
BY 2011	0.0	-	0.1	29
BY 2016	0.1	20	0.1	29
BY 2021	0.3	60	0.3	87

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

Convenience Goods

5.22 In the short term, there is no capacity for any increase in convenience retail floorspace or extension to existing provision; this is due to the identified existing floorspace trading at expected levels. In the medium to long term, there is capacity for a modest increase in convenience retail provision, of up to 20 sq. m (net) by 2016 and 60 sq. m by 2021. The capacity identified in the long term could be met by new convenience floorspace.

5.23 There are no food retail commitments in Broseley.

Comparison Goods

5.24 There is capacity identified for modest additional comparison retail floorspace in Broseley in the short, medium and long term; the capacity in the medium to long term could support new comparison retail units. Over the period to 2011, there is scope for an additional 29 sq. m (net) of comparison goods floorspace. Over the period to 2021, the identified capacity increases to 87 sq. m and could support a small expansion in town centre retail activity.

5.25 There are currently not any commitments for comparison retail development in Broseley.

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*Quantitative Retail Capacity - **Highley***

5.26 Table 5.5 sets out the convenience and comparison retail capacity for Highley 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 5.5: QUANTITATIVE CAPACITY – HIGHLEY TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE BRIDGNORTH AREA)*

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
AT 2006	0.0	-		
BY 2011	0.1	-	0.0	-
BY 2016	0.2	40	0.0	-
BY 2021	0.3	60	0.0	-

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

Convenience Goods

5.27 In the short term, there is no capacity for any increase in convenience retail floorspace or extension to existing provision; this is due to the identified undertrading of existing floorspace. In the medium to long term, there is capacity for a modest increase in convenience retail provision, of up to 40 sq. m (net) by 2016 and 60 sq. m by 2021. The capacity identified in the long term could be met by new convenience floorspace.

5.28 There are no food retail commitments in Highley.

Comparison Goods

5.29 The household survey did not identify Highley as a comparison shopping destination. On this basis, there is no statistically based quantitative need for additional comparison retail floorspace. The are not any commitments for comparison retail development in Broseley.

Quantitative Retail Capacity – ***Much Wenlock***

5.30 Table 5.6 sets out the convenience and comparison retail capacity for Much Wenlock 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 5.6: QUANTITATIVE CAPACITY – MUCH WENLOCK TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE BRIDGNORTH AREA)*

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
AT 2006	-	-		
BY 2011	0.0	-	0.1	29
BY 2016	0.1	20	0.2	58
BY 2021	0.2	40	0.4	116

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

Convenience Goods

5.31 In the short term, there is no capacity for an increase in convenience retail floorspace. In the medium to long term, there is capacity for a modest increase in convenience retail floorspace of up to 40 sq. m (net), dependent upon the type of proposal that comes forward. The capacity identified in the long term could allow for an extension of convenience retail provision in Much Wenlock.

5.32 There are no food retail commitments in Much Wenlock.

Comparison Goods

5.33 There is limited capacity in the short term for additional comparison retail floorspace in Much Wenlock. In the medium to long term there is scope for an additional 58 sq. m (net), at 2016, and 116 sq. m (at 2021) of comparison goods floorspace, which could provide scope for a modest expansion of town centre retail floorspace. Over the periods to 2016 and 2021, the identified capacity would support some limited growth in town centre retail activity.

5.34 There are no commitments for comparison retailing in Much Wenlock.

*Quantitative Retail Capacity - **Shifnal***

5.35 Table 5.7 sets out the convenience and comparison retail capacity for Shifnal 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 5.7: QUANTITATIVE CAPACITY – SHIFNAL TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE BRIDGNORTH AREA)*

YEAR	CONVENIENCE		COMPARISON	
	£(m)	Sq. m (net)	£(m)	Sq. m (net)
AT 2006	0.3	60		
BY 2011	0.5	100	0.3	87
BY 2016	0.8	160	0.7	203
BY 2021	1.1	220	1.2	276

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

Convenience Goods

5.36 In the short term, there is capacity for a modest increase in convenience retail floorspace or extension to existing provision of up to 60 sq. m. The capacity identified would support a small sized convenience store trading at a sales density of £5,000/sq. m. In the medium to long term, there is capacity for a further, but still small scale, convenience floorspace of 160 sq. m by 2016 and 220 sq. m by 2021, dependent upon the type of proposal that comes forward. The capacity identified in the medium to long term could allow for a new small to medium sized convenience store in the town.

5.37 There are no food retail commitments in Shifnal.

Comparison Goods

5.38 There is capacity identified for limited additional comparison retail floorspace in Shifnal in the short term and more substantial additional floorspace in the medium and long term. Over the period to 2011, there is scope for an additional 87 sq. m (net) of comparison goods floorspace. Over the periods to 2016 and 2021, the identified capacity, of 203 sq. m net and 276 sq. m net respectively, would support a modest expansion in town centre retail activity.

5.39 There are no commitments for comparison retailing in Shifnal.

Policy Advice – ***Convenience Goods***

5.40 The Council permitted, in April 2005, an extension to the Sainsbury's store in Bridgnorth with a net convenience retail sales area of 418 sq. m. The turnover of the extension, at company average sales density, is likely to be £3.9m. Taking into account the current overtrading of stores in Bridgnorth, there is a residual £12.8m of expenditure available currently; this is set to rise to £14.9m by 2011. The Council should make provision for a small to medium sized foodstore in Bridgnorth to meet the identified need.

5.41 There is no overriding need to make provision for new convenience retail floorspace elsewhere in the District.

*Policy Advice –****Comparison Goods***

5.42 Table 5.8 summarises the commitments for comparison retail development in Bridgnorth at September 2005.

TABLE 5.8: COMPARISON RETAIL COMMITMENTS IN BRIDGNORTH TOWN CENTRE

PROPOSAL	FLOORSPACE (sq. m) gross	FLOORSPACE (sq. m) net
Freestanding Store - Old Smithfield	3,716+garden centre	2,482
Sainsbury's extension	482	418
Open Class A1 – Old Smithfield	225	180
TOTAL	**4,423**	**3,080**

5.43 Table 5.6 identifies that existing commitments in Bridgnorth town centre for comparison retail development could deliver 3,080 sq. m (net) of additional comparison retail floorspace. The identified capacity for new comparison retail floorspace, over the period to 2011, is 1,257 sq. m and 2,943 sq. m by 2016. Based upon the assessment in this Study, commitments could meet the identified need for additional comparison floorspace in Bridgnorth over the period to 2015. There is no need currently to identify a site/sites to meet the capacity beyond this period unless the Council is identifying an extension to town centre retail activity.

5.44 PPS6 sets out the time frame over which need should be assessed, as set out in Paragraph 5.2 above. Paragraph 2.52 of PPS6 states that:

> ***'In planning for growth in their town centres, local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of the development plan documents, although for large town centre schemes a longer time period may be appropriate to allow for site assembly'.***

5.45 Proposals for additional comparison floorspace outside of the primary shopping area should be resisted, on the basis that the existing commitments will meet the identified need for additional comparison retail floorspace over the period to 2011, and for considerable time beyond this.

5.46 At an average sales density of £3,500/ sq. m, which is typical to 'high street' non-food floorspace in a small town centre, the need identified over the period to 2011 (£4.4m) would support floorspace of approximately 1,250 sq. m. The 'high street' retail units permitted as part of the Sainsbury's permission are some 225 sq. m, leaving a residual 1,000 sq. m, or thereabouts, to be provided for outside of the existing town centre.

5.47 There is no overriding need to plan for comparison retail expansion in other centres in the District.

Retail Conclusion

5.48 The retail need conclusions for Bridgnorth are:

- There is no requirement to identify an additional site for new convenience retail floorspace as there is no quantitative need, taking into account existing potential commitments, until after 2016. The need for allocations beyond this date can be determined through the Local Development Framework and any future review of this Retail Study;
- The commitment at the Sainsbury's convenience store will meet the identified quantitative need for additional convenience goods floorspace in the short to medium term;
- The significant level of overtrading at the Sainsbury's and Somerfield stores in Bridgnorth is indicative of a qualitative need to improve food retail provision in the town; and
- Should the Old Smithfield site (open Class A1 non food) come forward for comparison retail development, there is no requirement to identify any additional sites for new comparison retail floorspace until 2015. The need for allocations beyond this date can be determined through the Local Development Framework and any future review of this Retail Study;

- A site of size large enough to accommodate about 1,000 sq. m (net) of non-food retail floorspace should be identified as an extension to Bridgnorth town centre. At an average sales density of £3,500/ sq. m, which is typical to ‘high street’ non-food floorspace in a small town centre, the need identified over the period to 2011 (£4.4m) would support floorspace of approximately 1,250 sq. m. The ‘high street’ retail units permitted as part of the Sainsbury’s permission are some 225 sq. m, leaving a residual 1,000 sq. m, or thereabouts, to be provided for outside of the existing town centre. The extension to the town centre should be at Old Smithfield to reflect the current commitment for open Class A1 non-food retail; and
- There is no need to identify sites for additional retail floorspace in any other centres in the District other than in the Bridgnorth.

District Leisure Capacity

Cinema

5.49 There is a three screen cinema in Bridgnorth. The capacity analysis at **Appendix 10** indicates that there is currently capacity for three screens in Bridgnorth District (already met), based upon current market share. On the basis that annual visits per person will increase over to the periods to 2011, 2016 and 2021, the capacity will increase to four screens by 2010 and five screens by 2016 and 2021. This assessment takes into account cinema-goers from the District who visit cinemas currently outside of the Bridgnorth area.

5.50 The capacity analysis indicates that there is a theoretical need, in the long term, for additional cinema screens in Bridgnorth, provided the frequency of attendance continues to increase and those cinema-goers leaving the District currently, use facilities within it.

5.51 Any new cinema provision should be within the defined town centres and contribute to preserving or enhancing the vitality and viability of the towns.

Bingo

5.52 There are no large-format registered bingo halls in Bridgnorth District. The capacity assessment at **Appendix 10** indicates that there is capacity currently for one large format bingo hall in the Study Area. There is a residual capacity that could be met by smaller facilities or more informal bingo activities, where registration as a club is not necessarily required. There is a quantitative need for bingo hall provision. The need is likely to remain constant over the period to 2021.

5.53 The Council should be supportive of proposals for a large-format bingo hall in Bridgnorth District, provided that it is within a town centre and contribute to the overall vitality and viability of that centre.

Bowling

5.54 Bridgnorth District does not have a ten pin bowling destination. The capacity assessment at **Appendix 10** indicates that, based upon current market share, there is a need for six lanes in Bridgnorth District and there is a quantitative need. In the Study area, there is current need for six lanes and therefore a shortfall in provision.

5.55 Participation in ten-pin bowling is predicted to reduce over the periods to 2010 and 2016 and then increase again by 2021. By 2021, capacity could reach seven lanes. There is a current and future need for ten pin bowling lanes in Bridgnorth. Any proposals that come forward should only be considered acceptable if they are within the town centre.

Health and Fitness

5.56 There are three health and fitness clubs in Bridgnorth area (including the Severn Centre). The capacity assessment at **Appendix 10** indicates a need in the Study area for 14 large format health and fitness clubs, indicating that current provision is well behind demand. The capacity for large format health clubs could increase to 22 clubs over the period to 2021. There is an immediate need to provide for new health and fitness clubs in the District. The Council would be justified in supporting proposals within the town centres which contribute to the vitality and viability of those centres.

6 POLICY ADVICE AND OVERALL STRATEGY

Shopping Centre Boundaries and Primary Shopping Areas

6.01 The Council adopted the Bridgnorth Local Plan (2006) on 18 July 2006. The Council will save the policies of the local plan as development plan policy for a period of three years or until the local plan is superseded by the Local Development Framework (LDF).

6.02 The 2006 Plan identifies shopping centre boundaries for the six principal centres, including separate boundaries for Bridgnorth High Town and Bridgnorth Low Town. This Study advises upon whether the Council should consider changing or extending any of these shopping centre boundaries in the forthcoming Local Development Framework.

Scale of Development

6.03 Paragraph 3.12 of PPS6 states that an indicative upper limit for the scale of a development which is likely to be acceptable in particular centres for different facilities may be set out in development plan documents. The LDF should give consideration to the scale of development that would be appropriate in each of the principal centres. The appropriate scale of development in each of the principal centres is set out in Section 6.

Town Centres and Retail Policies

6.04 The 2006 Plan includes policies general to town centre and retail development and policies specific to individual centres.

6.05 General Policy E4, included at **Appendix 12** for ease of reference, restricts new retail development to within the existing shopping centres of the six principal centres, with the exception of: the provision of village shops and post offices within settlements in the countryside; neighbourhood shops in the urban areas; retail development where a qualitative and quantitative need has been demonstrated and there would be no adverse economic impact on existing town centres and a sequential approach is followed; or a farm shop as part of a farm diversification scheme.

6.06 Policy E4 is not entirely in accordance with the guidance contained within PPS6 on town centres and retail development and should be revised for the LDF, to be in accordance with this guidance or any future guidance which supersedes it. For Policy E4 to accord with PPS6, it will be necessary to define, in each centre where it is relevant to do so, a Primary Shopping Area in addition to a town centre boundary.

6.07 Based upon the current PPS6 guidance, the revised policy should state that, with the exception of sites that are allocated for retail development in the LDF, proposed new retail development, including proposed extensions to existing retail floorspace, that are outside of the defined primary shopping areas (or town centre where no Primary Shopping Area is defined) should demonstrate a need for the proposed development, that the proposal complies with the sequential approach to site selection and that the proposal would not have an adverse effect on the continued vitality and viability of existing centres.

6.08 PPS6 is explicit that it is not necessary to demonstrate the need for retail proposals within the Primary Shopping Area or for other main town centre uses located within the town centre (Paragraph 3.8). Need must be demonstrated for any application for a main town centre use which would be in an edge-of-centre or out-of-centre location and which is not in accordance with an up-to-date development plan document strategy. The LDF policy should make it clear that within the defined shopping centre boundaries, the requirement to demonstrate need is for retail uses only, that are outside of the Primary Shopping Area where one is defined.

6.09 There is a requirement to demonstrate need where a development is proposed on a site in an edge-of-centre or out-of-centre location. Edge-of-centre is defined as:

> **'For retail purposes, a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area. For all other main town centre uses, this is likely to be within 300 metres of the town centre boundary'.**

Out-of-centre, it follows, is a site in a location that is beyond what is reasonably considered a site in an edge-of-centre location.

6.10 PPS6 is also explicit that planning authorities should place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure developments.

6.11 The LDF should be clear that, in terms of the sequential approach, this should be applied to all development proposals for main town centre uses, on sites that are not in an existing centre and are not allocated for the use that is applied for in the LDF (Paragraph 3.13). The LDF should be explicit that, for a retail proposal in the town centre there is a requirement to demonstrate need, but no explicit requirement to undertake a sequential approach to site selection.

6.12 PPS6 states that impact assessments should be undertaken for any application for a main town centre use which would be in an edge-of-centre or out-of-centre location and which is not in accordance with an up-to-date development plan strategy. In respect of retail proposals, this applies to any site which is outside of the defined Primary Shopping Area (where one is defined) and for all other main town centre uses a site which is outside of the defined town centre.

6.13 The exception criteria included in Policy E4 of the 2006 Plan can be carried forward to the LDF if the Council considers this to be appropriate. A detailed statement of the requirement to demonstrate need, that a sequential approach to site selection was adopted and that the proposed development would not cause an adverse impact on any defined centre will override the need for the third exception criteria that dealt previously with these issues.

6.14 The Council should amend the general retail and town centre policies based upon the advice given. Policies specific to individual towns are considered in the centre-by-centre analyses below.

Albrighton

Shopping Centre Boundary

6.15 The shopping centre boundary of Albrighton, as defined on the Local Plan proposals map, is shown on the plan attached at **Appendix 13**. In the centre of Albrighton are a library and a community centre that, at present, are excluded from the shopping centre boundary. The shopping centre should be redefined as the town centre and extended to include the library and the community centre. There is no requirement to identify a Primary Shopping Area in Albrighton.

Development Constraints

6.16 Albrighton town centre is focussed upon the junction of High Street and Station Road and surrounded by residential areas. There is little opportunity for additional development. The town centre serves local shopping needs and should continue to provide this role. There is no reason for the centre to increase in size materially.

Indicative Appropriate Scale of Development

6.17 Section 5 of this Study sets out the need for new retail development over the period to 2021.

Bridgnorth

High Town, Shopping Centre Boundary

6.18 The shopping centre boundary of Bridgnorth High Town, as defined on the Local Plan proposals map, is shown on the plan attached at **Appendix 13**.

6.19 The 2006 Plan extended the High Town shopping centre boundary to include the car park ancillary to the Sainsbury's foodstore and part of the site known as Old Smithfield. The purpose of the extension is to provide for the quantitative need for additional non-food retail floorspace in the town over the period to 2011. This is in accordance with the recommendation of the Inspector who reported on the Inquiry into the Local Plan. Existing commitments for non-food floorspace will meet a significant proportion of the need for additional floorspace, but there is a requirement for up to 1,000 sq. m (net) of additional non-food floorspace by 2011, over and above that met by existing commitments.

6.20 The forthcoming LDF should extend the shopping centre boundary further, and redefine this as the town centre boundary, to include all of the land between the Sainsbury's store and curtilages of properties on the north side of Whitburn Street and the remainder of the site which is identified in the Local Plan as development site BRID10. It should also include the Doctor's Surgery and Hospital at the edge of the Old Smithfield site. The shopping centre boundary should also be extended to incorporate the entirety of the site which is identified in the Local Plan as development site BRID13; the Majestic Cinema site. The inclusion of BRID10 and BRID13 in the shopping centre boundary will remove the requirement for site allocations and these should be deleted in the LDF.

6.21 Policy BRID7 of the 2006 Plan identifies a Primary Shopping Frontage to the west side of High Street and the north side of Whitburn Street. The LDF should redefine this as the Primary Shopping Area and extend it to include the east side of High Street between Church Street and Cartway and the south side of Whitburn Street to match the extent of the Primary Shopping Area to the north side of Whitburn Street. Within the Primary Shopping Area, there would be no requirement for retail or town centre proposals to demonstrate need or consider impact. Elsewhere in the town centre, outside of the Primary Shopping Area, the tests of need and impact would apply.

6.22 The extension of the High Town shopping centre boundary will achieve a more spatially appropriate town centre area, within the town centre boundary, and aid the better planning for retail and town centre development in Bridgnorth.

Low Town, Town Centre

6.23 The shopping centre boundary of Bridgnorth Low Town, as defined on the Local Plan proposals map, is shown on the plan attached at **Appendix 13**.

6.24 Low Town spans the River Severn, although it is concentrated principally to its east side. The boundary as defined currently includes the majority of commercial uses in the centre. There may be some merit in extending the boundary on the eastern side of the river northwards, towards the junction with Wolverhampton Road. The extension could include the land which is bounded currently by: the shopping centre boundary; Cann Hall Road; Mill Street; and the roundabout which links Cann Hall Road and Mill Street with Wolverhampton

Road. The 2006 Plan does not define a Primary Shopping Frontage and there is no requirement to define a Primary Shopping Area.

6.25 Policy BRID8 of the local plan states that:

> **'Within the Low Town Shopping Centre, redevelopment for non-retailing use of the site identified in the Bridgnorth inset map will not be permitted'.**

6.26 The supporting text to Policy BRID8 states that: '

> **'If Low Town is to retain its role as a local service centre then it would be desirable for a significant element of convenience floorspace to be retained. The retention of a site currently occupied by a supermarket (Somerfield) off Mill Street is considered to be vital to maintaining the vitality and viability of the Low Town shopping centre. Proposals for the redevelopment of this site will be resisted.**

6.27 Policy BRID8 does not prevent the redevelopment or re-use of the existing supermarket site for comparison retailing, which is at odds with the supporting text. Moreover, unless there is a specific restriction on the planning permission, to convenience retail only, the store could convert to a comparison goods store under permitted development rights. There is no indication that the current occupant has any intention to vacate the unit and, even if this eventuality did occur, the reoccupation by a comparison retailer would not cause necessarily an adverse effect on the continued vitality and viability of Low Town.

6.28 The policy is justified, but cannot fulfil the objective of the supporting text. If the Policy is carried forward to the LDF, then the objective of the policy should be made clear in the supporting text. It is justified for a Council to seek protection of the proportion of floorspace within a centre that is devoted to non-retail uses. The Council may wish to consider revising the policy to prevent a cumulative increase in non-retail floorpsace over and above a certain threshold. If the continued use of the existing supermarket in Low Town for Class A1 retail uses is the principal consideration, then there is justification in the policy remaining as written currently.

Development Constraints

6.29 Bridgnorth High Town and Bridgnorth Low Town are connected to one another, but function as different commercial areas. Bridgnorth Low Town is constrained physically and there is little opportunity to increase the commercial activity beyond the existing floorspace. There is a number of opportunities for the expansion of Bridgnorth High Town, there is active interest in a number of these opportunities and some development is likely to come forward within the short to medium term.

6.30 Bridgnorth High Town is the principal commercial centre in the District and the appropriate location in which to concentrate any larger-scale retail or other commercial town centre development. However, the development of Bridgnorth High Town must be in accordance with national planning policy, the overall retail and town centre objectives for the District which are set out in the 2006 Plan and ultimately the LDF and should not result in any adverse impact on existing commercial activity in the Primary Shopping Area of High Town or the other defined centres within the District.

Indicative Appropriate Scale of Development

6.31 Section 5 of this Study sets out the need for new retail development over the period to 2021.

Broseley

Shopping Centre Boundary

6.32 The shopping centre boundary of Broseley, as defined on the Local Plan proposals map, is shown on the plan attached at **Appendix 13**. The shopping centre is linear, extending along High Street and Barber Street. To the south of the defined shopping centre are a library and health centre that, at present, are excluded from the shopping centre boundary. The shopping centre should be redefined as the town centre and extended to include the library and the health centre. There is no requirement to identify a Primary Shopping Area in Broseley.

Development Constraints

6.33 Broseley town centre is surrounded principally by residential areas and there is little opportunity to expand the centre physically. The town centre is focussed upon the junction of High Street and Barber Street and there is little opportunity for additional development. The town centre serves local shopping needs and should continue to provide this role. In this regard, housing site BRO1, to the immediate north of the town centre, has the capacity to accommodate some 90 dwellings and will increase the demand for local retail services. There is no reason for the centre to increase in size materially.

Indicative Appropriate Scale of Development

6.34 Section 5 of this Study sets out the need for new retail development over the period to 2021.

Highley

Shopping Centre Boundary

6.35 The shopping centre boundary of Highley, as defined on the Local Plan proposals map, is shown on the plan attached at **Appendix 13**. Highley is the smallest of the six principal centres and comprises some 20 commercial units. In the centre of Highley are a Class A4 and a Class A5 use, to the west side of Crescent Terrace and north of Coronation Street that, at present, are excluded from the shopping centre boundary. The shopping centre should be redefined as the town centre and extended to include these additional units. There is no requirement to identify a Primary Shopping Area in Highley.

Development Constraints

6.36 Highley town centre is surrounded by residential areas. There is little opportunity for additional development. The town centre serves local shopping needs and should continue to provide this role. There is no reason for the centre to increase in size materially.

Indicative Appropriate Scale of Development

6.37 Section 5 of this Study sets out the need for new retail development over the period to 2021.

Shifnal

Shopping Centre Boundary

6.38 The shopping centre boundary of Shifnal, as defined on the Local Plan proposals map, is shown on the plan attached at **Appendix 13**. The centre is focussed upon the cross-roads where Market Place, Victoria Road, Bradford Street and Aston Street meet. The centre extends a short distance along Victoria Road, but extends principally northwards on Bradford Street and southwards on Market Place. At the northern extreme of the defined shopping centre, where Bradford Street meets Shrewsbury Road, is a motor vehicle showroom that is included in-part within the shopping centre boundary. The site is a potential future development opportunity for expansion of retail activity in Shifnal and should be included within the defined shopping centre boundary in the LDF. The shopping centre should be redefined as the town centre.

6.39 It would be appropriate for the Council to define a Primary Shopping Area in Shifnal. The Primary Shopping Area should extend along the east side of Bradford Street from Aston Street to the junction of Bradford Street and Shrewsbury Road and along Cheapside where is runs parallel with the west side of Bradford Street.

Development Constraints

6.40 There is a number of sites in edge-of-centre locations surrounding Shifnal that could come forward as development opportunities for retail or other commercial development. However, Shifnal is a compact retail centre serving principally local shopping needs. The town centre should retain this role and any development should be in keeping with and complementary to the existing retail offer. It is important to define a Primary Shopping Area in Shifnal to clarify that development within this area may proceed without having to satisfy the principal retail tests set out in national guidance, but any proposal outside of this area either within or on the edge of the town centre would be subject to these considerations. There is little opportunity for additional development within the existing town centre, other than the potential for redevelopment of the car showroom site.

Indicative Appropriate Scale of Development

6.41 Section 5 of this Study sets out the need for new retail development over the period to 2021

Much Wenlock

Shopping Centre Boundary

6.42 The shopping centre boundary of Much Wenlock, as defined on the Local Plan proposals map, is shown on the plan attached at **Appendix 13**. The shopping centre is focussed upon the junction of Wilmore Street and High Street and extends south-west along High Street as far as its junction with St Owen's Road. There is a number of commercial uses in the St Mary's Lane/Barrow Street area of the town, but these are interspersed by residential uses and there is no justification in extending the town centre area. The shopping centre should be redefined as the town centre. There is no requirement to identify a Primary Shopping Area in Much Wenlock.

Development Constraints

6.43 Much Wenlock town centre is focussed upon the junction of Wilmore Street and High Street and surrounded by residential areas to it north, south and west. To the east is open countryside. There is little opportunity for additional development. The town centre serves local shopping needs and should continue to provide this role. There is no reason for the centre to increase in size materially.

Indicative Appropriate Scale of Development

6.44 Section 5 of this Study sets out the need for new retail development over the period to 2021.

Definition of Centres

6.45 In light of the above conclusions, it would be appropriate for the Council to define the status of the principal centres in the District, in the context of the definitions contained within PPS6. WYG considers that the appropriate definitions are: Bridgnorth as a town centre; Shifnal as a district centre; and Albrighton, Broseley Highley and Much Wenlock as local centres.

Town Centre Management

6.46 An initiative to set up a Town Centre Management Partnership has recently been established in Bridgnorth. The Partnership will bring together representatives from the public and private sectors to address common issues affecting the town and will aim to ensure that the town is an attractive and desirable place in which to live, visit, work and invest. This will also include support for existing businesses and bringing in new businesses. A small Steering Group has been established consisting of independent retailers/businesses within the town and the District Council.

6.47 The Steering Group is currently looking to establish its membership and extend it to include each tier of local government and major employers. There may, in the future, be a town centre manager for Bridgnorth. WYG advises that a town centre manager for the District would assist in guiding retail and commercial activity in the town centre in addition to representing retailers' interests. In the interests of representing commercial interests across the District, the Council should consider the appointment of any town centre manager in the context of that TCM being responsible for all centres in the District.