Birmingham
RETAIL NEEDS ASSESSMENT
EXECUTIVE SUMMARY

October 2009

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INSTRUCTIONS

1

Birmingham City Council commissioned Roger Tym & Partners (RTP) to undertake this study by way of its letter of 29 August 2008, following a competitive tender process. The specification explains that the study is to provide an assessment of the need for additional retail development in Birmingham up to 2026 and form part of the evidence base for the City Council’s emerging Core Strategy Development Plan Document (DPD).

2

The overall requirement is for a PPS6 compliant study with separate assessments for both the comparison and convenience retail sectors. The study has a forward horizon to 2026, but provides separate outputs for the periods 2008-2016, 2016-2021 and 2021-2026. The specification states, however, that whilst the assessment will need to be as precise and accurate in forecasting need for the earlier periods, broader and more indicative assessments of need from 2021 to 2026 are likely to be appropriate given the uncertainty inherent in predicting such requirements.

3

In the comparison sector, the specification requires:

i) a specific output for both Birmingham City Centre and Sutton Coldfield, to reflect their role in the wider network of strategic centres;

ii) an assessment of the scale of comparison retail floorspace which could be available to support three new, or expanded centres proposed in the Birmingham Prospectus; and

iii) an indication of any additional comparison retail requirements for which provision would need to be made elsewhere, and how these should be distributed across the city.

4

In considering the convenience retail sector, the study should provide sufficient detail to enable requirements to be identified for different parts of the city, in particular the scope for addressing the ‘gap areas’.

5

Finally, the specification requires that the study should consider, in broad terms, the impact which the levels of growth proposed for Birmingham would have on centres in other areas.

NATIONAL AND REGIONAL POLICY CONTEXT

National - PPS6

6

The provisions of PPS6 reflect the Government’s wider emphasis on the need to plan, monitor and manage at both the regional and local planning levels; the key changes in national policy emphasis that arose as a result of its publication, in March 2005, were:

i) a requirement for a much more proactive plan-led approach to planning for town centres through regional and local planning;

ii) much more emphasis on the need to develop a network and hierarchy of centres, at both the regional and local levels; and
iii) a much greater involvement on the part of the public sector in the management and implementation of changes in town centres and in the monitoring of their vitality and viability.

7 Where growth cannot be accommodated within existing centres, LPAs are to plan for the extension of the primary shopping area, if there is a need for retail provision, and for the extension of the town centre as a whole to accommodate other main town centre uses.

**National - PPS1**

8 PPS1 sets out the Government's policy on the delivery of sustainable development. There are two key aspects in relation to the requirements of the study brief:

i) the emphasis that *good planning ensures that we get the right development, in the right place and at the right time*; and the fact that

ii) two of the government’s four aims for sustainable development relate to *social progress* and the *maintenance of high and stable levels of economic growth*, so that in seeking to meet these aims there is a recognition that DPDs should ensure, inter alia, that the impact of development on the social fabric of communities is taken into account, that there is a reduction in social inequalities and that there is good access to retail, leisure and community facilities for all.

**National - PPS12**

9 Section 4 of PPS12 explains the intended nature of core strategies. In particular, we note that each core strategy must include:

i) an overall vision which sets out how the area should develop;

ii) strategic objectives for the area;

iii) a delivery strategy for achieving these objectives which sets out how much development is intended to happen, where and by what means it will be delivered, and with locations for strategic development indicated on a key diagram; and

iv) clear arrangements for management and monitoring the delivery of the strategy.

10 In turn, the vision should be in general conformity with the Regional Spatial Strategy (RSS) and closely relate to the Sustainable Community Strategy, and the strategic objectives should form the link between the vision and the delivery strategy.

11 PPS4 also introduces a new test of *soundness*. To be *sound*, a core strategy should be justified, effective and consistent with national policy.

**Regional Spatial Strategy**

12 Paragraph 3.8 of the adopted RSS states that development in the Major Urban Areas (MUAs) of Birmingham/Solihull, the Black Country, Coventry and the North Staffordshire conurbation will be delivered by the creation of *a balanced network of vital and vibrant town and city centres as the strategic focus for major retail, leisure and office developments*. The MUAs will also be the primary focus for additional investment and sustainable economic growth.
Paragraph 7.62 of the Phase Two Revision Draft states that ‘significant growth is forecast in comparison retail expenditure’, and that there will be a need for additional comparison retail floorspace over the period to 2026, the majority of which should be planned for within the network of strategic centres. Policy PA12A sets out the comparison retail floorspace requirements in Birmingham and Sutton Coldfield, as follows:

- Birmingham: 2006-2021 = 225,000 sq.m gross. 2021-2026 = 130,000 sq.m gross.
- Sutton Coldfield: 2006-2021 = 35,000 sq.m gross. 2021-2026 = 15,000 sq.m gross.

However, the Phase Two Revision Draft points out that the requirements for 2021 to 2026 should be treated as indicative only, and in bringing forward retail schemes to meet these requirements, local authorities should seek to ‘ensure the strategic centres maintain and improve the diversity and choice of their retail offer’.

CURRENT PERFORMANCE OF BIRMINGHAM’S CENTRES

**Birmingham City Centre**

Most of the health check indicators point to a significant improvement in Birmingham City Centre’s overall vitality and viability. Much of this is attributable to the highly successful and visible retail-led regeneration of the city centre that has been supported by the proactive and progressive approach of the City Council.

However, two performance indicators raise concern; the first is the higher than average vacancy rate in the City Centre, both in terms of the proportion of vacant units and the proportion of vacant floorspace. Indeed, in November 2008, there were 187 vacant units in the city centre, equating to a vacancy rate of 16.58 per cent, which is significantly higher than the UK average of 11.07 per cent.

The second indicator giving rise to some concern is the deterioration in prime yields in Birmingham City Centre since January 2008. Indeed, at 5.25 per cent in July 2008 (the latest available data from the Valuation Office), Birmingham’s prime yield is significantly worse (higher) than in Nottingham, Glasgow, Manchester and Leeds.

Moreover, we consider that there is a need to improve the representation of independent traders in the city centre and other niche operators. Thus, in order to help diversify the retail offer in Birmingham, we recommend two key courses of action:

i) expansion of the retail core into Southside and/or Digbeth, which would help to improve the flow of pedestrians throughout the centre, and would provide a specialised retail destination where complementary creative and independent retail uses could thrive side by side; and

ii) the introduction of flexible and shorter term all inclusive rental packages which are attractive to start up and independent retailers.

**Sutton Coldfield**

Our evaluation of the PPS6 performance indicators suggests that Sutton Coldfield is a relatively stable centre, but that it is under-performing in relation to its potential. Thus, whilst we note that Sutton Coldfield appears to be generally busy, has a clean and
pleasant town centre environment and has a low vacancy rate, the centre has fallen 53 places, since 2000/01, to 194th in MHE’s 2008 Shopping Index. Moreover, Sutton Coldfield falls far behind other strategic centres in the sub-region, such as Solihull and Walsall, which achieve considerably higher rankings of 49 and 99 respectively.

Thus, we consider that Sutton Coldfield is underperforming in relation to the local spending power of its population and its position within the hierarchy of centres in the wider Birmingham area. At present, the town appears to be serving a predominantly local function, with many local residents travelling to Birmingham City Centre to undertake their main comparison shopping trips.

Nevertheless, proposals outlined in the Sutton Coldfield Town Centre Regeneration Framework seek to address these weaknesses by ensuring that the local population has the quality of shops and leisure activities to encourage them to spend locally. It is envisaged that the enhancement of the retail offer in Sutton Coldfield will act as the much needed catalyst for the regeneration of the town centre.

**District Centres**

All of the district centres perform a valuable role, both as centres of retail and services and as community foci. It is important, therefore, that they secure appropriate levels of investment, in accordance with their specific needs. The health checks demonstrate that there are variances in the vitality and viability of the district centres. Thus, whilst some centres remain exceptionally healthy and continue to perform well in relation to the key indicators of vitality and viability, others are demonstrating significant evidence of weakness and the onset of decline.

Our assessment of the various centres’ overall levels of health is summarised in Table 1. This indicates that six of the district centres can be considered as healthy; a further five are demonstrating some signs of weakness; and that the remaining six are in need of varying degrees of intervention.

**Black and Minority Ethnic (BME) Retailing**

The study has found that BME businesses form an important part of Birmingham’s retail landscape. Indeed, Asian centres provide a retail offer which meets most of the local catchment’s needs in a single destination. Moreover, given their niche offer, they are able to draw visitors from a much wider catchment than would be expected, sometimes extending beyond the Birmingham city region.

It is important to acknowledge the role that small BME retailers play in catering for the needs of their local communities, where more often than not there can be problems of deprivation and poor health, related to limited access to fresh and affordable food. BME convenience retailers are thus well placed to ‘plug’ the gaps in these areas and thus tackle the issue of food deserts by providing access to affordable and fresh food in areas where there is little scope for major entrants such as Tesco or Asda due to lack of suitable and available sites. Thus, we consider it important that local authorities seek to maintain and enhance retail diversity in these areas through the LDF process.
Table 1: Performance in Relation to Key PPS6 Indicators

<table>
<thead>
<tr>
<th>Centre</th>
<th>Diversity of Uses</th>
<th>Retailer Requirements</th>
<th>Multiple Retailer Representation</th>
<th>Vacancy Rate</th>
<th>Footfall</th>
<th>Accessibility</th>
<th>Public Realm</th>
<th>OVERALL SUMMARY OF HEALTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birmingham City Centre</td>
<td>Green</td>
<td>Yellow</td>
<td>Red</td>
<td>Green</td>
<td>Yellow</td>
<td>Yellow</td>
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<tr>
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<td>Acocks Green</td>
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<td>Red</td>
<td>Green</td>
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<td>Yellow</td>
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<td>Green</td>
<td>Yellow</td>
<td>Yellow</td>
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<td>19</td>
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<td>Perry Barr</td>
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<td>Yellow</td>
<td>Yellow</td>
<td>Green</td>
<td>3</td>
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<tr>
<td>Fox and Goose</td>
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<td>Yellow</td>
<td>Red</td>
<td>Green</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Green</td>
<td>14</td>
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</table>

**Specialist BME Centres**

<table>
<thead>
<tr>
<th>Centre</th>
<th>Diversity of Uses</th>
<th>Footfall</th>
<th>Vacancy Rate</th>
<th>Accessibility</th>
<th>Presence of Specialist Retailers</th>
<th>Public Realm</th>
<th>Ability to Cater for BME Community</th>
<th>OVERALL SUMMARY OF HEALTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small Heath</td>
<td>Green</td>
<td>Yellow</td>
<td>Red</td>
<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
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<td>Red</td>
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<td>Yellow</td>
<td>Yellow</td>
<td>Yellow</td>
<td>15</td>
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**Key to overall summary of health**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>19 - 21</td>
<td>Very healthy</td>
</tr>
<tr>
<td>16 - 18</td>
<td>Healthy but some room for improvement</td>
</tr>
<tr>
<td>11 - 15</td>
<td>Showing some signs of weakness</td>
</tr>
<tr>
<td>6 - 10</td>
<td>Showing significant signs of weakness; performs poorly in relation to key indicators</td>
</tr>
<tr>
<td>&lt;5</td>
<td>Very weak; performs poorly against most of the key indicators.</td>
</tr>
</tbody>
</table>

**Key to individual health indicators**

<table>
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<th>Rating</th>
<th>Description</th>
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</thead>
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<td>3</td>
<td>Good/improving</td>
</tr>
<tr>
<td>2</td>
<td>Moderate/static</td>
</tr>
<tr>
<td>0</td>
<td>Poor/declining</td>
</tr>
</tbody>
</table>
CURRENT PATTERNS OF RETAIL AND LEISURE SPENDING

Comparison Goods Spending

26 Overall, some 72.5 per cent of the comparison goods expenditure of the residents of the Overall Catchment Area (OCA) is retained by centres, retail parks and freestanding stores located within the OCA. The main destinations within the OCA are: Birmingham city centre, which secures £1,393m of the residents’ comparison goods expenditure; Solihull town centre, which secures £506m; and Sutton Coldfield town centre which secures £237m of the comparison good expenditure available to residents of the catchment.

27 Short distance leakage to destinations such as Tamworth town centre, Merry Hill Shopping Centre, Redditch town centre and Dudley town centre account for 14.7 per cent of the residents’ comparison goods expenditure. Longer distance leakage, which includes Special Forms of Trading (SFT), accounts for a further 12.8 per cent.

28 Birmingham city centre secures a comparison goods market share in excess of 60 per cent in one zone, in excess of 50 per cent in three zones, in excess of 40 per cent in six zones (Figure 1) and in excess of 30 per cent in 11 of the 30 zones. The lowest comparison goods market share achieved by Birmingham city centre is in Zone 12 (Halesowen), at 2.94 per cent; however, we suspect that this is due to the close proximity of Merry Hill Shopping Centre at Brierley Hill, which is located in the nearby Buffer Zone.

29 Birmingham city centre secures an unopposed dominant comparison goods market share in excess of 40 per cent in three zones and, although it secures a market share in excess of 40 per cent in a further three zones, it faces subsidiary competition in these zones from centres which have a market share in the range of 10 per cent to 40 per cent (Figure 2).

30 For 20 of the 30 zones in the OCA there is no dominant comparison goods centre, but in 17 of these zones Birmingham City Centre exerts a subsidiary influence. It is in these 20 zones, where the catchments of the various centres most overlap, where competition for comparison goods market share is most intense.

31 Sutton Coldfield town centre achieves a maximum comparison goods market share of 37.36 per cent in its local Zone 6.

Convenience Goods Spending

32 The findings of the household survey reveal that 12 of the 30 zones in Birmingham’s catchment have per capita convenience goods spending below the UK average, for 2008, of £1,676. Overall, 90.8 per cent of this expenditure on convenience goods is retained within the OCA; as might be expected, and due to the nature of expenditure for such goods, there is a minimal level of strategic leakage.

33 Nevertheless, the findings of the household survey indicate that there has been a continuing polarisation trend in the convenience goods sector, in that the 37 large convenience superstores located within the OCA collectively account for 63 per cent of the aggregate convenience goods expenditure of the residents of the OCA.
Figure 1: Birmingham City Centre’s Market Shares for Comparison Goods

- Primary Catchment Area (Birmingham CC achieves a market share of 40pc or above)
- Secondary Catchment Area (Birmingham CC achieves a market share of between 20pc and 39pc)
- Tertiary Catchment Area (Birmingham CC achieves a market share of between 10pc and 19pc)
- Quarternary Catchment Area (Birmingham CC achieves a market share of less than 10pc)

Legend:
- Study Zones
- The Administrative Area of Birmingham City Council
- The Boundaries of Neighbouring Local Authorities

Digital Map Data © Collins Bartholomew Ltd 2009
Postcode Information © Royal Mail Group PLC 2009
Figure 2
Comparison Goods Market Shares: Dominant Centres and Centres of Subsidiary Influence

Market Share over 40%
- Birmingham
- Solihull
- Walsall

Centre of Subsidiary Influence
- Solihull
- Birmingham
- Sears/Solihull Gate Retail Park
- Shirley
- Sutton Coldfield
- Tamworth
- Tamworth
- Ventura Retail Park
- Cannock
- Lichfield
- King’s Heath
- Castle Vale
- Castle Vale Retail Park
- Erdington
- Perry Barr
- Stechford
- Walsall
- Harbourne
- Dudley
- Merry Hill Shopping Centre
- Oldbury
- West Bromwich
- Halesowen
- Northfield
- Redditch
- Bromsgrove

The Administrative Area of Birmingham City Council
The Boundaries of Neighbouring Local Authorities
Study Zones

Digital Map Data © Collins Bartholomew Ltd 2009
Postcode information © Royal Mail Group PLC 2009

Roger Tym & Partners
M9296, October 2009
The findings of the household survey further indicate that there are areas of the catchment whereby there is a localised deficiency in convenience goods provision. In particular, we note the very low localised retention rates in Zones 24 (Birmingham City Centre South), of Zone 11 (West Bromwich South), and of Zone 28 (Moseley). Furthermore, we note that Zones 7 (North Solihull), Zone 18 (Erdington), Zone 19 (Water Orton) and Zone 21 (Saltley) have localised convenience goods retention rates of less than 30 per cent. Thus, the survey indicates that there is a need for an improved convenience offer in several areas of the OCA, although we note that there are several foodstore commitments in the pipeline which will help to address some of these gaps.

**Leisure Services Spending**

Birmingham city centre, Solihull, and Sutton Coldfield are by far the most important locations for spending at restaurants and cafes. Nevertheless, we note that expenditure by residents of the catchment on these activities is fairly localised, and that in many cases, destinations within the local zone also play an important role. Likewise, Birmingham and Solihull are also the most popular destinations for spending in pubs, bars and nightclubs, with local centres also performing well in their respective zones.

So far as cinemas are concerned, again Birmingham is the most popular destination. However, for residents located in the north of the catchment, the Showcase Cinema in Erdington is the most popular destination, whereas Solihull is the principal destination for those that reside to the south of the catchment area.

Birmingham city centre is by far the most popular destination for trips to museums and art galleries and trips to theatres and concert halls. Indeed, for both of these activities, Birmingham city centre is the most popular destination for all 30 of the study area zones.

Only 30 per cent of residents of the catchment area undertake visits to family entertainment centres. Of this proportion, the most popular destinations are Birmingham city centre (42 per cent) and Tamworth (16 per cent).

Just over two thirds of respondents do not participate in health and fitness activities. Nevertheless, of those that do undertake such activities, the most popular destination is Birmingham city centre.

**QUANTITATIVE AND QUALITATIVE RETAIL NEED**

**Comparison Retail Goods**

We have considered four different scenarios, based on alternative retention rates: a ‘static retention’ scenario; a ‘moderate increased retention’ scenario; a ‘significant increased’ retention scenario; and a ‘decreased retention’ scenario. We found that there is a negative residual requirement for additional comparison floorspace in the period up to 2016 under the ‘static’ and ‘decrease in retention’ scenarios; a position of almost zero balance for the ‘moderate increase in retention’ scenario; and a quantitative need for 17,000 sq.m under the ‘significant increase in retention’ scenario. The negative position for the ‘static’ and ‘decrease in retention’ scenarios is a result of the expenditure growth being exceeded by the claims made on it from growth in floorspace efficiency, growth in SFT and planning commitments.
However, there is a positive residual for additional comparison floorspace across the whole of the OCA under all scenarios in the period up to 2021, which ranges from 91,000 sq.m gross under the ‘declining retention’ scenario, to 241,000 sq.m gross under the ‘significant increase in retention’ scenario (Table 2).

Table 2 Quantitative Need in the OCA’s Comparison Goods Sector (Sq.m Gross)

<table>
<thead>
<tr>
<th></th>
<th>Static Retention</th>
<th>Moderate Increase in Retention</th>
<th>Significant Increase in Retention</th>
<th>Decrease in Retention</th>
</tr>
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<tbody>
<tr>
<td>2008-2016</td>
<td>-17,000</td>
<td>-1,000</td>
<td>17,000</td>
<td>-35,000</td>
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<tr>
<td>2008-2021</td>
<td>135,000</td>
<td>177,000</td>
<td>241,000</td>
<td>91,000</td>
</tr>
<tr>
<td>2008-2026</td>
<td>336,000</td>
<td>411,000</td>
<td>486,000</td>
<td>261,000</td>
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<td>177,000</td>
<td>224,000</td>
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<td>2021-2026</td>
<td>202,000</td>
<td>234,000</td>
<td>245,000</td>
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In the period to 2026, the requirement for additional comparison floorspace ranges from 261,000 sq.m gross under the ‘declining retention’ rate scenario, to 486,000 sq.m gross under the ‘significantly increased retention’ rate scenario. Although this overall range is very wide, we do not consider that it is sensible to plan for a downturn in the retention rate, and have included it in this study purely for illustrative purposes, so as to demonstrate what might happen if material levels of development do not occur within the OCA in response to competition from new development outside the OCA.

We note that Policy PA12A of the emerging RSS envisages that Birmingham City Centre will secure 225,000 sq.m gross of comparison goods floorspace in the period 2006-2021. This figure includes commitments such as Martineau Galleries, whereas the figures in Table 2 above have made an allowance for commitments. Thus, the emerging RSS is suggesting an increase in comparison goods floorspace in the city centre of 140,000 sq.m gross, over and above Martineau Galleries, by 2021. This would represent a very substantial proportion of the residual need identified in Table 2 and would require the achievement of the significant uplift scenario.

Convenience Retail Goods

In the convenience sector, the current retention level is very much as expected and there is no case to alter it, and so we consider only one scenario based on a static level of retention at 90.8 per cent.

The residual convenience goods need from 2008 up to 2026 is negative (Table 3). This is due to the low forecast rate of expenditure growth in the convenience sector (relative to the comparison sector) and the substantial turnover requirements of extant permissions, in particular the planned Tesco stores at Yardley, Soho, Stirchley and at Fox and Goose (Hodge Hill), the Asda at Chelmsley Wood and the Sainsbury’s store at Selly Oak.
Table 3 Quantitative Need in the OCA’s Convenience Goods Sector (Sq.m Gross)

<table>
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<th>Static Retention</th>
<th>2008-2016</th>
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</tbody>
</table>

However, despite the negative residual across the OCA as a whole, we consider it important that localised convenience needs are met in the short-term. Indeed, an important part of the LDF process is to remedy deficiencies in local shopping and other essential services, so as to assist in reducing social exclusion. We have identified six broad areas within the Birmingham LA boundary where there is a localised deficiency in convenience goods provision and we consider that these areas should be a priority for additional foodstore provision; they are as follows:

i) Sutton Coldfield/ Erdington;

ii) Perry Barr/ Handsworth;

iii) Eastern belt/ Meadway;

iv) Birmingham City Centre South;

v) Longbridge/ Selly Oak and the Southern Belt; and

vi) Woodgate.

RETAIL HIERARCHY AND CLASSIFICATION OF CENTRES

Birmingham City Centre, Sutton Coldfield Town Centre and the 17 District Centres all perform a valuable role as both centres of retail and services and as a focus for community activities. Thus, it is important that they receive appropriate levels of investment/intervention in accordance with their specific needs.

The health checks demonstrate that there are significant variations with regard to the performances of each of the centres, with some performing well in relation to the PPS6 indicators of vitality and viability, and others significantly underperforming and in need of varying degrees of intervention. This analysis can be used to inform the decision-making process with regard to the allocation of funding and the preparation of strategies for the improvement of those centres which are in most need.

In seeking to classify the centres, we have undertaken an analysis based on the following indicators:

i) composite comparison goods market share;

ii) size of the centre based on the total number of units;

iii) RTP’s local provision index;

iv) ranking in MHE’s 2008 UK Shopping Index;

v) overall summary of health based on health check visits; and

vi) proportion of vacant units.
These indicators enable us to rank the 17 district centres according to the diversity, scale and quality of their retail provision, accessibility, and quality of the town centre environment. However, we consider that it is also important to take into account other, non-retail uses when categorising centres, and thus, when interpreting the results of our analysis, which is based purely on retail needs, it is important, also, to consider the extent to which a particular centre caters for leisure and commercial uses.

Table 4 summarises our performance analysis of the various centres and Graph 1 seeks to demonstrate which centres are most and least healthy, based on our assessment of vitality and viability indicators and our audit of local provision.

**Graph 1 Summary of Vitality and Viability Indicators and Audit of Local Provision**

![Graph showing the summary of vitality and viability indicators and audit of local provision.](image-url)
<table>
<thead>
<tr>
<th>Ref.</th>
<th>Survey Zone</th>
<th>Centre</th>
<th>Composite Comp Goods Market Share (£m)</th>
<th>Size</th>
<th>Local Provision Audit</th>
<th>MHE 2008 Ranking</th>
<th>Qualitative Analysis of Vitality &amp; Viability¹</th>
<th>Total Units</th>
<th>Vacant</th>
<th>Vacancy%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>20</td>
<td>Birmingham CC</td>
<td>1,392.68</td>
<td>Large</td>
<td>-</td>
<td>3</td>
<td>1128</td>
<td>187</td>
<td>17</td>
<td>17%</td>
</tr>
<tr>
<td>2</td>
<td>6</td>
<td>Sutton Coldfield</td>
<td>236.55</td>
<td>Large</td>
<td>-</td>
<td>194</td>
<td>197</td>
<td>23</td>
<td>12</td>
<td>12%</td>
</tr>
<tr>
<td>1</td>
<td>26</td>
<td>Acocks Green</td>
<td>38.01</td>
<td>Medium</td>
<td>34</td>
<td>581</td>
<td>111</td>
<td>7</td>
<td>6</td>
<td>6%</td>
</tr>
<tr>
<td>2</td>
<td>21</td>
<td>Saltley</td>
<td>2.25</td>
<td>Medium</td>
<td>27</td>
<td>2356</td>
<td>112</td>
<td>8</td>
<td>7</td>
<td>7%</td>
</tr>
<tr>
<td>3</td>
<td>25</td>
<td>Small Heath</td>
<td>12.53</td>
<td>Medium</td>
<td>35</td>
<td>1420</td>
<td>93</td>
<td>11</td>
<td>12</td>
<td>12%</td>
</tr>
<tr>
<td>4</td>
<td>24</td>
<td>Edgbaston</td>
<td>0</td>
<td>Small</td>
<td>20</td>
<td>1139</td>
<td>7</td>
<td>8</td>
<td>12</td>
<td>22%</td>
</tr>
<tr>
<td>5</td>
<td>18</td>
<td>Erdington</td>
<td>97.32</td>
<td>Large</td>
<td>96</td>
<td>285</td>
<td>230</td>
<td>34</td>
<td>15</td>
<td>15%</td>
</tr>
<tr>
<td>6</td>
<td>21</td>
<td>Fox and Goose</td>
<td>0</td>
<td>Small</td>
<td>38</td>
<td>-</td>
<td>59</td>
<td>6</td>
<td>10</td>
<td>10%</td>
</tr>
<tr>
<td>7</td>
<td>23</td>
<td>Harborne</td>
<td>33.38</td>
<td>Medium</td>
<td>53</td>
<td>522</td>
<td>92</td>
<td>6</td>
<td>7</td>
<td>7%</td>
</tr>
<tr>
<td>8</td>
<td>29</td>
<td>Kings Heath</td>
<td>72.07</td>
<td>Large</td>
<td>75</td>
<td>322</td>
<td>279</td>
<td>34</td>
<td>12</td>
<td>12%</td>
</tr>
<tr>
<td>9</td>
<td>6</td>
<td>Mere Green</td>
<td>1.47</td>
<td>Medium</td>
<td>50</td>
<td>5720</td>
<td>82</td>
<td>14</td>
<td>17</td>
<td>17%</td>
</tr>
<tr>
<td>10</td>
<td>30</td>
<td>Northfield</td>
<td>69.71</td>
<td>Large</td>
<td>60</td>
<td>336</td>
<td>136</td>
<td>12</td>
<td>9</td>
<td>9%</td>
</tr>
<tr>
<td>11</td>
<td>5</td>
<td>New Oscott</td>
<td>62.07²</td>
<td>Small</td>
<td>33</td>
<td>2608</td>
<td>61</td>
<td>9</td>
<td>15</td>
<td>15%</td>
</tr>
<tr>
<td>12</td>
<td>17</td>
<td>Perry Barr</td>
<td>82.31</td>
<td>Large</td>
<td>51</td>
<td>399²</td>
<td>140</td>
<td>13</td>
<td>9</td>
<td>9%</td>
</tr>
<tr>
<td>13</td>
<td>27</td>
<td>Selly Oak</td>
<td>45.87</td>
<td>Medium</td>
<td>37</td>
<td>669</td>
<td>82</td>
<td>2</td>
<td>2</td>
<td>2%</td>
</tr>
<tr>
<td>14</td>
<td>26</td>
<td>Sheldon</td>
<td>2.61</td>
<td>Small</td>
<td>15</td>
<td>694</td>
<td>53</td>
<td>2</td>
<td>4</td>
<td>4%</td>
</tr>
<tr>
<td>15</td>
<td>17</td>
<td>Soho Road</td>
<td>4.85</td>
<td>Large</td>
<td>67</td>
<td>-</td>
<td>166</td>
<td>27</td>
<td>16</td>
<td>16%</td>
</tr>
<tr>
<td>16</td>
<td>27</td>
<td>Stirchley</td>
<td>5.45</td>
<td>Medium</td>
<td>31</td>
<td>1716</td>
<td>159</td>
<td>50</td>
<td>31</td>
<td>31%</td>
</tr>
<tr>
<td>17</td>
<td>26</td>
<td>Swan Yardley</td>
<td>0</td>
<td>Small</td>
<td>22</td>
<td>-</td>
<td>52</td>
<td>46</td>
<td>88</td>
<td>88%</td>
</tr>
</tbody>
</table>

¹Based on the centre's performance in relation to key PPS6 indicators as discussed in more detail in the Health Check Section of our Report

²This is the ranking for the One Stop Shopping Centre which comprises the vast majority of Perry Barr District Centre

³This market share includes the Princess Alice Retail Park, hence the value which is disproportionately high given the limited range of service on offer in New Oscott DC
Table 5 provides our overall summary of the performance of Birmingham’s centres and our recommended hierarchy, based on size of centre and its health. It is important to note, however, that the results presented in Table 5 represent a ‘snapshot’ of the health of each centre at the specific time of our assessment; it does not take into account the potential for a centre to move up, or indeed down, the hierarchy. In this context, we are eager to stress that whilst a centre may have been classed as ‘very weak’, that is not to say that it does not have the capacity to improve. Similarly, in those centres we have classed as being ‘very healthy’, there is no room for complacency. This point is particularly pertinent given the significant redevelopment proposals which are in the pipeline for centres such as Edgbaston and Swan Yardley.

Table 5 Recommended Retail Hierarchy, Based on Size and Current Health of Centre

<table>
<thead>
<tr>
<th>Category of Centre</th>
<th>Very Healthy</th>
<th>Healthy But Room For Improvement</th>
<th>Showing Signs of Weakness</th>
<th>Very Weak – No Longer Viable Without Intervention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Centre</td>
<td>Birmingham</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub-Regional Centre/Town Centre</td>
<td>Sutton Coldfield</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Major District Centre</td>
<td>Erdington</td>
<td>Perry Barr</td>
<td>Small Heath</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Kings Heath</td>
<td>Soho Road</td>
<td>Selly Oak</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Northfield</td>
<td></td>
<td>Salltley</td>
<td></td>
</tr>
<tr>
<td>Medium-Sized District Centre</td>
<td>Acock Green</td>
<td></td>
<td></td>
<td>Stirchley</td>
</tr>
<tr>
<td></td>
<td>Harborne</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mere Green</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minor District Centre</td>
<td>Sheldon</td>
<td></td>
<td></td>
<td>Edgbaston</td>
</tr>
<tr>
<td></td>
<td>Fox and Goose</td>
<td></td>
<td></td>
<td>Swan Yardley</td>
</tr>
<tr>
<td></td>
<td>New Oscott</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

On the basis of our analysis, we consider that all of the district centres, as defined in the Birmingham Local Centres Strategy, continue to function as such and whilst some centres are performing better than others, we do not advocate the re-classification of any of the district centres downwards in the retail hierarchy to local centre. Similarly, we do not consider that there is justification to promote any of the district centres.

Nevertheless, our analysis of Birmingham’s centres has enabled us to classify each one according to its size and current state of health. With this in mind, we consider that the Council should consider sub-division of the 17 district centres into three categories of ‘minor’, ‘intermediate’ and ‘major’. This classification will act as a guide for the scale of development and investment that is likely to be appropriate in each.
We consider, also, that the creation of three new ‘hubs’ - possibly located at Perry Barr, Selly Oak and Meadway - would help to prevent the over-concentration of growth in the city centre and help to reduce the need to travel by ensuring that existing gaps in the network are filled and that key convenience and service needs are met on as localised basis as possible.

STRATEGIES FOR MEETING RETAIL NEEDS

Comparison Needs

We have considered eight strategies for meeting comparison retail needs, as summarised in Table 6 and with the policy objectives and evaluation criteria set out in Table 7.

Table 6 Strategic Growth Options for Distribution of Retail Floorspace Needs

<table>
<thead>
<tr>
<th>Growth Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Status quo</td>
<td>Distribution of future floorspace needs in line with current market share. This model assumes constant market shares</td>
</tr>
<tr>
<td>2. Polarisation</td>
<td>Greatest market share increase for Birmingham and low market share increases for remaining centres. This reinforces and accentuates Birmingham’s dominance and further reinforces the market shares of the remaining higher order centres. This growth is likely, however, to be at the expense of the smaller centres</td>
</tr>
<tr>
<td>3. Focus on Birmingham City Centre and Sutton Coldfield</td>
<td>Greatest market share increase for Birmingham, slightly lower increase for Sutton Coldfield and lowest increases for the remaining 17 District Centres. Growth in Sutton Coldfield is beneficial given the weaknesses identified, but this option may harm the smaller centres</td>
</tr>
<tr>
<td>4. Focus on Birmingham City Centre, Sutton Coldfield and Major District Centres</td>
<td>Greatest market share uplifts for Birmingham and Sutton Coldfield and slightly lower uplift for the 5 Major District centres</td>
</tr>
<tr>
<td>5. Focus growth according to RTP assessment of health</td>
<td>Greatest market share uplift for those centres which we have identified as in need of ‘major’ intervention, smaller growth for those in need of ‘intermediate’ intervention and low levels of growth for those which we perceive as in need of ‘minor’ intervention</td>
</tr>
<tr>
<td>6. Focus growth according to physical capacity</td>
<td>Directs development to centres that have the greatest physical capacity for growth. This option has similarities with option 2, since the centres with the most physical capacity are, more often than not, the larger centres</td>
</tr>
<tr>
<td>7. Focus growth on medium and smaller district centres</td>
<td>Promotes substantial growth in the 12 medium-sized and minor District Centres. These centres have the lowest market shares, and thus this option would make them more competitive with the higher order centres. This option is essentially the converse of option 4</td>
</tr>
<tr>
<td>8. Focus growth according to ‘three centres strategy’</td>
<td>Greatest market share increase for Perry Barr, Selly Oak and Meadway. This strategy is based on proposals outlined in the Core Strategy Issues and Options paper and the Birmingham Prospectus</td>
</tr>
</tbody>
</table>
Table 7 Key Policy Objectives and Assessment Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Main Source(s)</th>
<th>Policy Requirements/Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hierarchy - avoid over concentration of growth in the higher order centres</td>
<td>The Birmingham Prospectus, Core Strategy Issues and Options, Policy PA11 RSS Phase 1 Revision</td>
<td>Birmingham’s recent renaissance has focused heavily on the city centre which is acknowledged as the economic heart of the region. However transformation is now being proposed throughout the city region to prevent the over concentration of growth in the city centre.</td>
</tr>
<tr>
<td>Social Inclusion - linking opportunity to need</td>
<td>Policy PA11 RSS Phase 1 Revision</td>
<td>Development Plans should identify and develop policies for the centres within their respective areas which best meet local needs.</td>
</tr>
<tr>
<td>Networks - addressing deficiencies and gaps in the network of centres</td>
<td>Policy PA11 RSS Phase 1 Revision, Core Strategy Issues and Options</td>
<td>Policy PA11 sets out a network of 25 strategic town and city centres across the region. This network will be the focus for major development. The Core Strategy is underpinned by the principle of a ‘global city’ with a world-class centre supported by a network of vibrant urban villages.</td>
</tr>
<tr>
<td>Sustainability - locate development so as to reduce the need to travel and enable people to meet needs</td>
<td>Policy T2 RSS Phase 1 Revision</td>
<td>Local Authorities, developers and other agencies should work together to reduce the need to travel, especially by car through promoting patterns of development which are easily accessible by public transport.</td>
</tr>
<tr>
<td>Sustainability - best use of previously developed land to promote environmental quality</td>
<td>Policy QE1 RSS Phase 1 Revision, Core Strategy Issues and Options</td>
<td>Local Authorities should support regeneration by restoring degraded areas, conserving existing environmental assets, including the use of redundant and under-used buildings.</td>
</tr>
<tr>
<td>Retail Development - investment should be consistent with the existing role of centres</td>
<td>Policy PA11 RSS Phase 1 Revision</td>
<td>Local Authorities should be proactive in encouraging appropriate development to maintain and enhance their function as town centres. The vitality and viability of other centres should not be undermined.</td>
</tr>
<tr>
<td>Deliverability - assessment of viability and commercial realism</td>
<td>PPS12</td>
<td>It must be demonstrated that strategies and objectives are deliverable, taking into account the need for sufficient infrastructure, policy considerations, involvement of key stakeholders and partners, and compatibility with aspirations in neighbouring authorities where cross boundary issues are relevant.</td>
</tr>
<tr>
<td>Economic Regeneration - Contribution to the economic competitiveness of the region</td>
<td>Policy PA12 RSS Phase 1 Revision</td>
<td>Birmingham should continue to be developed as a major Regional capital of European and international standing by providing further development opportunities and supporting infrastructure and telecommunications.</td>
</tr>
</tbody>
</table>

We recommend a strategy based on a combination of Options 4, 5 and 8; this would involve meeting retail needs according to the following principles:

- maintain commitment to the substantial amount of comparison floorspace already in the development pipeline for Birmingham City Centre, but prioritising those schemes which are already committed, in particular New Street Station and Martineau Galleries; this would ensure that the role of Birmingham as a global city is maintained, an aspiration that is reinforced in the emerging Phase 2 Revision of the RSS;
• direct a proportionate amount of new comparison floorspace to Sutton Coldfield, in seeking address the weaknesses we have identified in this centre and in line with floorspace requirements of the emerging RSS;

• direct a proportionate amount of growth to the five major District Centres;

• focus growth, according to the ‘three centres concept’ outlined in the emerging Core Strategy and in the Birmingham Prospectus, to Perry Barr, Selly Oak and Meadway; and

• direct a proportionate amount of growth to the medium sized and minor district centres which we have identified as being in need of significant intervention.

58 In light of the findings of our land use audits, which revealed several centres with higher than average vacancy rates, we consider that existing units may have a role to play in accommodating some of the projected growth in comparison retail floorspace. This is particularly the case in centres which would benefit from the modernisation of existing stock in order to make it more efficient and attractive to national high street retailers.

59 The overall quantitative need in the comparison goods sector up to 2026 is set out earlier in Table 2. These needs relate to the whole of the OCA, whereas in advising on the distribution of need we focus only on those centres within the administrative area of Birmingham City Council, as summarised in Figures 3 and 4.

60 There is a need to embrace the PPS6 requirement for a proactive approach to promoting growth and managing change in the network of centres, in particular in Birmingham City Centre and Sutton Coldfield, given the additional comparison floorspace that has been directed to these centres in the emerging RSS. Partners at the local level will need to be given sufficient resources, tools and guidance to ensure that growth is directed in the most appropriate and effective manner. The Council should focus on measures to bring forward development opportunities and assist in land assembly. Where possible and where necessary, joint public private partnerships, the use of CPO’s and the implementation of area action plans should be encouraged.

61 In line with the requirement to plan monitor and manage, this retail needs assessment should be updated in five years time and floorspace projections rolled forward. Such an update will allow for an assessment of the impact that recent and major development has had on shopping and leisure patterns in Birmingham and, more importantly, a better idea of the medium and longer term effects of the current recession.
<table>
<thead>
<tr>
<th>Area</th>
<th>Preferred Option</th>
<th>Floor Space (sq.m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birmingham</td>
<td>Redevelopment and Expansion</td>
<td>250,000 (130,000)</td>
</tr>
<tr>
<td>Sutton Coldfield</td>
<td></td>
<td>44,000 (15,000)</td>
</tr>
<tr>
<td>Selly Oak</td>
<td>Supporting 3 new Growth Hubs</td>
<td>60,000 (32,000)</td>
</tr>
<tr>
<td>Perry Barr</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meadway</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Major District Centres</td>
<td>Reversing Decline and Addressing Weaknesses</td>
<td>12,000 (7,000)</td>
</tr>
<tr>
<td>Medium District Centres</td>
<td></td>
<td>11,000 (6,000)</td>
</tr>
<tr>
<td>Minor District Centres</td>
<td></td>
<td>6,000 (3,000)</td>
</tr>
<tr>
<td>Remaining Birmingham Centres</td>
<td>Enhancement of Existing Offer</td>
<td>6,000 (3,000)</td>
</tr>
</tbody>
</table>
Figure 4  Preferred Option for Distribution of Comparison Floorspace
From 2008 to 2026 in Birmingham Based on Further Update
RSS Growth Rates (2021-2026 figures in brackets (sq.m gross))

Birmingham

Redevelopment and
Expansion

235,000 sq.m gross (140,000)

Sutton Coldfield

40,000 sq.m gross (19,000)

Selly Oak

Supporting 3 new Growth Hubs

Perry Barr

Meadway

60,000 sq.m gross (20,000)

Major District Centres

Reversing Decline and
Addressing Weaknesses

19,000 sq.m gross (6,000)

Medium District Centres

15,000 sq.m gross (5,000)

Minor District Centres

11,000 sq.m gross (3,000)

Enhancement of Existing Offer

Remaining Birmingham Centres

9,000 sq.m gross (3,000)
Convenience Needs

The OCA retains 90.8 per cent of total expenditure on convenience goods from its residents and we consider that there is little scope for improvement. Nevertheless, for several zones within the OCA, the localised convenience goods retention rate is particularly low; it is these zones where ‘gaps’ in the market exist and subsequently where there is the greatest scope for new entrants.

The gap analysis draws on several strands of research, including correspondence with convenience operators, analysis of existing and future foodstore provision in Birmingham using GIS mapping, our own land use audits of existing provision in the centres and desk based research. Thus, Figure 5 provides an overview of where the gap areas exist, based on what is deemed to be an acceptable standard of accessibility to key local retail and service facilities. These ‘gap areas’ are as follows:

- **Sutton Coldfield/Erdington** - This includes Sutton Coldfield, the areas to the east of Sutton Coldfield and the area in and around Witton and Nechells, located to the south west of Erdington, parts of which suffer from high levels of deprivation.

- **Perry Barr/Handsworth and Western Belt** - This includes the area to the west of Perry Barr and extends right up to the Birmingham LA boundary. There is significant scope for the improvement of convenience goods provision in this locality; this would complement the existing success of Soho Road.

- **Eastern Belt/Meadway** - This area comprises the ‘belt’ running from Meadway to the boundary of the Birmingham LA. In addition to low localised convenience goods retention rates, the area is also characterised by inadequate convenience goods provision and high levels of deprivation. Nevertheless, proposals to expand the centre at Meadway should begin to address some of these deficiencies.

- **Birmingham City Centre South** - Located directly to the south of the city centre, this area has a low localised convenience goods retention rate, high levels of deprivation and a clear qualitative need for additional convenience floorspace.

- **Longbridge/Selly Oak and Southern Belt** - Located at the southernmost boundary of the Birmingham LA, proposals to create a new neighborhood centre here should help to fill the gap in terms of convenience goods provision. However, this needs to be complemented by improving access to foodstores in surrounding areas such as West Heath and Kings Norton, where levels of deprivation are high.

- **Woodgate** - This area is located to the south of Quinton, in and around Woodgate. Foodstore provision here is particularly limited, as is provision in terms of local and district centres; deprivation in this ward is also high.
Having identified the ‘gap areas’, our report also provides advice on foodstore site selection. The key factors for consideration are summarised in the box below.

**Wider Planning Context**
- Is the retail convenience offer in keeping with the needs of the local community
- Will the development improve confidence in the area
- Is regeneration of the area a local issue or does it involve a wider image of the area
- Can retail or food-led regeneration change the image of the area by drawing visitors from a wider catchment
- Does such a draw justify the scale of the development, and is the scale in keeping with existing uses in the centre

**Retail Structure**
- What are the failings in the existing convenience offer
- Will the development adequately fill identified gaps in the convenience offer
- How will the development fit with the existing retail structure and how will it fit with existing retailers, in particular independent or niche operators

**Employment**
- What type of employment does the area require in terms of skills
- Will such retail or food development provide jobs and opportunities that benefit the area

**Regeneration**
- How will any partnership ensure that local authority goals are not sacrificed to developer goals
- Whose retail needs is the development designed for and will it meet these needs

In certain areas, existing commitments will go some way to satisfying the needs of the gap areas, but the Council still has work to do in ensuring that the convenience needs of all residents of the catchment are met on as localised basis as is possible. This is particularly important in those areas with high levels of deprivation and subsequently where levels of car ownership are low; such areas should be a priority for the Council when considering locations for foodstore development.

The Council will need to consider the size of foodstores necessary in the gap areas and ensure that they are capable of meeting both weekly and top-up shopping needs. Nevertheless, it also is important to ensure that development is in keeping with the existing role and function of any nearby centre, so as to prevent it causing harm, and very careful consideration should be given when assessing proposals for large foodstores in out-of-centre locations.

It will be necessary for the Council to assess the benefits of linked trips associated with in-centre and edge-of-centre proposals. The provision of a new foodstore catering for main food shopping, particularly where that foodstore is located in or on the edge of an existing...
centre, will contribute to clawing back trade to such centres. This is especially important for those centres where we have identified deterioration in their health and performance.

68 In compliance with the government requirement to ensure that councils are accommodating growth through the most effective use of land and buildings within and on the edge of existing centres, the Council should also consider the use of under-utilised sites such as car parks and single-storey buildings which could be re-developed for multi-storey retail development.

69 Once suitable and available sites have been selected for foodstore development, the Council may wish to consider the use of tools such as area action plans, compulsory purchase orders and, where appropriate, town centre strategies to enable and guide development. Moreover, in light of the current unfavorable economic conditions, to help kick-start development and aid private sector partners, the Council may also wish to consider the following tools:

- assistance with provision of site infrastructure;
- site assembly;
- site investigation/remediation;
- gap funding; and
- development management.