St Matthew's Quarter, Walsall
Update of Evidence Base for Market Relocation

Walsall Council

August 2010

GVA Grimley

St. Matthew's Quarter – Relocation of Walsall Market

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1. INTRODUCTION

1.1 GVA Grimley has been appointed by Walsall Council to provide consultancy advice in relation to the update of the Evidence Base for the Market Relocation (as previously prepared by GVA Grimley, in September 2009).

1.2 This report updates the 2009 analysis and responds directly to the requirements of the consultancy brief (see **Appendix A**) supplied by Council Officers and within the terms of the consultant's appointment.

Purpose of Study

1.3 The starting point for this update is the client's brief as informed by the recommendations from our 2009 Study (see Section 2) and engagement with key stakeholders. The client's brief requires a professional judgement and conclusion to be reached on whether the contribution the Market makes to the vitality and viability of the town centre as a whole remains significant in its relocated position. The assessment is also to consider whether the interests of the centre as a single entity should take precedence over the interests of an element that makes up that centre, namely, in this case, the Market.

1.4 The brief requires the detailed advice to consider a range of permutations taking account of the following:

- Temporary relocation for three to five years or less, in the context of the current one year term of the planning permission;
- The possibility of a permanent relocation;
- The return of the Market to its original location in Digbeth;
- Advice on alterations to the layout of the Market in its current location; and
- Advice on any new locations within the town centre that may be applicable for the Market.

1.5 The following matters are each considered in detail:

- The impact on the vitality and viability of the town centre as a whole, from both a retailer and development / investment perspective, if the current Market were to remain in its relocated position. This includes an assessment of the impact on the constituent parts of the town centre, including the area formerly occupied by the Market, and other parts of the town centre, including the Saddlers Shopping Centre, the Old Square Shopping Centre and Park Street / The Bridge;

- The impact upon the Market itself if it were to:
  - Remain in its relocated position, as shown in **Figure 1.1**;
  - Remain in its relocated position with some adjustments proposed by Walsall MBC, as shown in **Figure 1.2**;
  - Return to its original location, as shown in **Figure 1.3**;
  - Or relocate to another position in Walsall Town Centre.
- An analysis of the relative importance of the Market to the overall vitality and viability of the town centre under each scenario. To inform this we have engaged with key stakeholders (including the Market Traders Association) and have undertaken 'soft market testing" discussions with a cross-section of retailers, major landowners, agents, developers and investment institutions who currently operate in the town centre and those who are not currently represented in the town centre. The summary of these consultations is provided in Section 6;
- The various scenarios for the future of the Market include an appraisal of the effectiveness of the new operational market management arrangements in making the town centre more attractive to investment. This analysis also identifies what steps should be taken to minimise any adverse impact upon retailers and shoppers in any option that recommends further changes to the relocation of the Market; and
- The analysis is based upon town centre health check indicators as identified in PPS 4, Planning for Sustainable Economic Growth Annex D and provides a comprehensive update of the advice provided within the 'St Matthew's Quarter – Relocation of Walsall Market, September 2009' report written and researched by GVA Grimley.

1.6 The report addresses these matters by describing four scenarios in Section 7, which are based upon the requirements set out above, and by their detailed assessment which is undertaken in Section 8.

1.7 The advice is provided having regard to:

- The current and predicted economic position to inform policy and actions now and in the future;
- Relevant planning policy at regional, sub-regional and local levels;

- Development proposals for Walsall Town Centre (including emerging proposals from Threadneedle and Norton and Proffitt / St. Modwen); those planned in competing town / city centres, and out-of-town locations;
- Reference to new case study examples of similar Market relocations which have impacted positively and negatively upon the vitality and viability of town centres (as provided to GVA Grimley by Council officers);
- Consideration of the previous research undertaken by GVA Grimley in 2009 as well as fresh financial and tenant management information (as provided); and
- The need to observe the confidential nature of the consultations and be aware of stakeholder sensitivities.

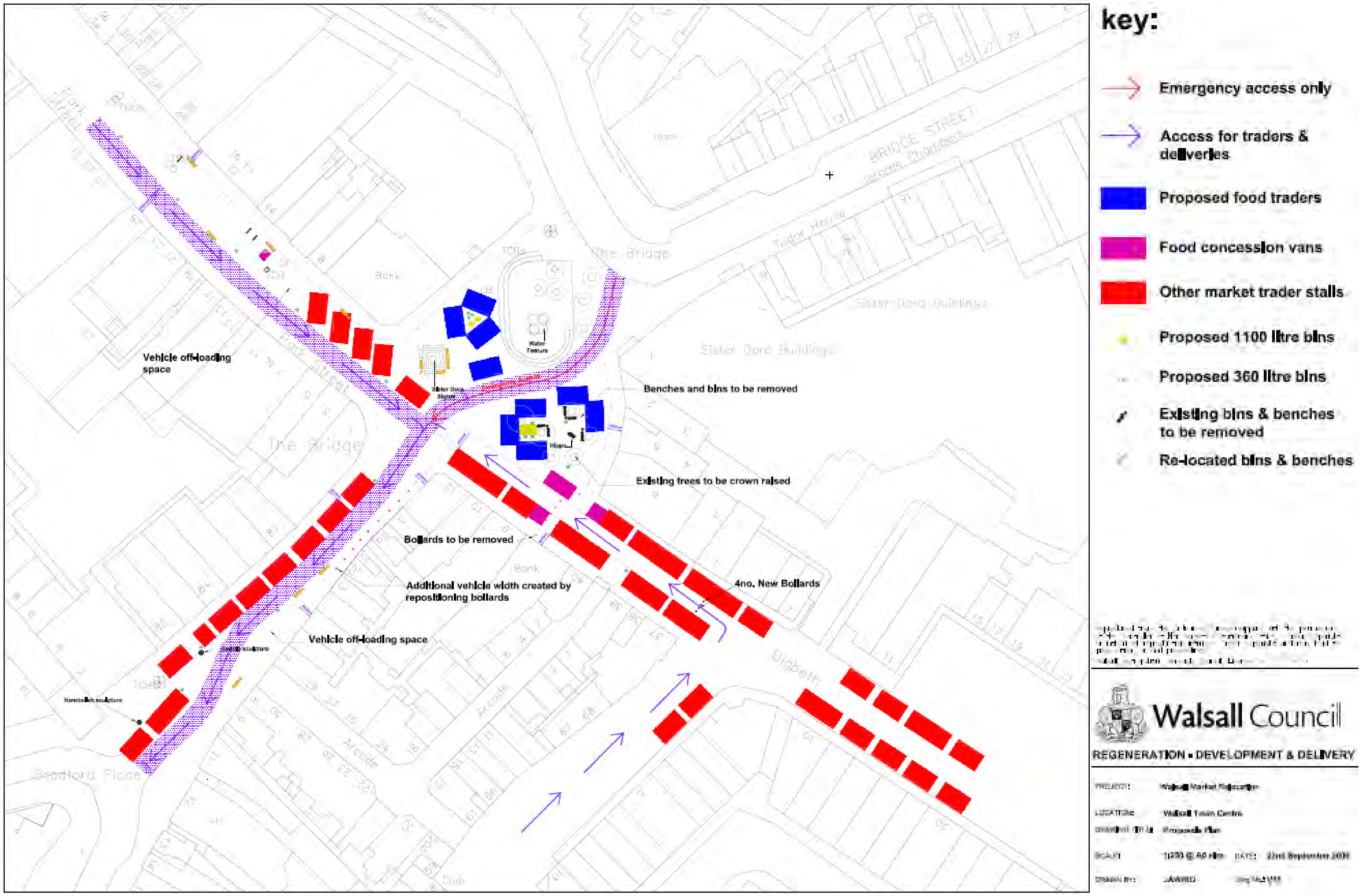
1.8 The report concludes with an overall assessment of the merits of the scenarios and provides recommendations on the way forward.

Report Structure

1.9 The remainder of this report is structured as follows:

- **Section 2** provides an overview of the background to this project and the relevant development history;
- **Section 3** summarises the planning policy context;
- **Section 4** updates our previous assessment of the generic role of markets in town centres before focusing on the specific role, function and performance of Walsall Market;
- **Section 5** provides a review of the performance of the town centre against the retail health check indicators that measure vitality and viability;
- **Section 6** summarises the key findings from the stakeholder engagement process that has been undertaken;
- **Section 7** outlines the scenarios that have been assessed for the relocation of the Market, and the approach taken their assessment;
- **Section 8** assesses the scenarios against an agreed set of assessment criteria; and
- **Section 9** draws together the conclusions and key recommendations.

Figure 1.1: Market in its current position



(Source: Walsall Council, 2009)

Figure 1.2: Market in its current position (with some adjustments as proposed by the Council) *(Source: Walsall Council, 2010)*

Figure 1.3: Market in its previous location at Digbeth (prior to 27th November 2009)

(Source: Walsall Council, 2010)

2. BACKGROUND AND DEVELOPMENT HISTORY

2.1 This section summarises the relevant background and development history of the area around St. Matthew's Quarter and the Walsall Market.

St. Matthew's Quarter

2.2 The St Matthew's Quarter in Walsall is a key area of the town centre where the Council and its partners continue to encourage retail-led investment. The St Matthew's Quarter is included within the primary shopping area designation of the Unitary Development Plan (UDP) and the emerging Black Country Joint Core Strategy (see **Figure 3.1**).

2.3 The area is envisaged as the focus for new comparison goods retail investment in the town centre including a street market and an opportunity to improve the town centre's leisure offer. It is anticipated that development in the area will be delivered in a comprehensive manner and connect well with existing retail facilities to improve pedestrian circulation. An urban design brief has been developed to aid this process and to inform the level of high quality design and public realm expected in the St Matthew's Quarter. The grade II* listed St Matthew's Church, which gives the area its name, provides a key landmark on the town centre skyline.

2.4 The St Matthew's Quarter is divided by Digbeth / High Street which forms part of the main north-west to south-east axis upon which the town centre has developed. To the north of Digbeth is the Old Square Shopping Centre, managed by Threadneedle Property and owned by Zurich Assurance and currently accommodates Tesco (although they will relocate to the former Walsall College site before the end of 2010) and Debenhams, where separate proposals are being considered by the landowners for improvements. To the south of this axis is land owned primarily by Norton and Proffitt / St Modwen, with a lesser interest held by the Council. Walsall's historic outdoor market is currently located around Digbeth, the Bridge, Lower Hall Lane, Bradford St and the southern end of Park St (**Figure 1.1**).

Phasing

2.5 In June 2007, the first phase of the St Matthew's Quarter redevelopment was realised with the opening of a new Asda supermarket, the largest town centre Asda store in the country. This development was accompanied by a 1,000 space multi-storey car park, a small number of ground floor retail units and 45 apartments.

2.6 It was intended that Phase 2 of the St Matthew's Quarter development would be delivered in 2007/8 through the conversion of the listed Shannon's Mill building into retail units, offices and 41 apartments by landowner Norton & Proffitt / St Modwen. A fire destroyed the mill building in August 2007.

2.7 A third phase of development was also planned which would have required part of the site then occupied by the Walsall Market in Digbeth (prior to its relocation) and would have reprovided the market stalls and associated infrastructure. However, following the Shannon's Mill fire, the Council are considering a more comprehensive development solution, incorporating Phases 2 and 3 outlined above and including George Street, Lower Hall Lane and Digbeth. Due to the continuing depressed economic climate, there is still no programme to deliver this wider scheme and therefore no identified location to which the Market can be permanently relocated.

2.8 We understand that Norton and Proffitt / St. Modwen are currently considering bringing forward a refurbishment scheme that will include some shop refurbishment and environmental improvements along the Digbeth and Lower Hall Lane frontages of their property. This would also include the demolition of the vacant market store unit to the rear of the property with this to be replaced by a surface level car park. This is considered further in Sections 5, 7 and 8.

Relocation of the Market

2.9 Up until the end of November 2009, Walsall Market was located along Digbeth (towards the Bridge) and around the Digbeth Market Square, with some stalls on Lower Hall Lane (**Figure 1.3**).

2.10 In light of the continuing uncertainty over the redevelopment proposals and faced with an economic recession, a deteriorating environment and the falling profitability of the Market, a political decision was taken to move the markets on a temporary basis to a more central location at The Bridge and a three year temporary planning consent was gained. This temporary move was subject to the threat of Judicial Review by Zurich Assurance who were concerned that removal of the Market would adversely impact upon the attractiveness and viability of Old Square. Following the threat of legal action and after receiving legal advice Walsall Council revoked their temporary planning consent (October 2008). Counsel advised that a robust evidence base should be created to support the Council's case for temporary relocation of the Market prior to implementation of the wider redevelopment.

2.11 The collation of this evidence base was undertaken by GVA Grimley during August / September 2009 to facilitate the relocation prior to the Christmas trading period. This considered the impact upon the vitality and viability (based on PPS6 and the then draft PPS4 town centre health check criteria) of the town centre as a whole if any of the three options identified below were implemented:

- **Option 1** - Market to remain in its original location in Digbeth (**Figure 1.3**);
- **Option 2** - Market to be temporarily located (for a period up to three years) to the area around The Bridge (with 16 stalls in Park Street); and
- **Option 3** - Market to be temporarily located (for a period up to three years) to a location that is a variant of Option 2 (with eight stalls in Park Street) (**Figure 1.1**).

2.12 The key conclusions and recommendations from the 2009 Study were as follows:

- The principle of temporarily relocating the Walsall Market to a more central location was endorsed to support its viability following several years of decline;
- The proposed relocation should help to improve the viability of the Market by giving it a more central position. However, the impact of the relocation should be reviewed after 12 months (i.e. this brief) to assess the consequences for the viability of the Market; the impact upon St Matthew's Quarter, the impact upon the vitality and viability of the wider town centre, and the effectiveness of the operational market management arrangements;
- Option 3 (the consultant's proposals) should be adopted as it would reduce the impact of the relocated market upon the commercial attractiveness of Park Street, the prime retail area in the town;
- Given the fragility of Walsall Town Centre from a retail perspective, policy measures should be introduced to improve its attractiveness to consumers, retailers, developers and investors including measures to improve / widen the market offer;
- The long-term solution and resolution of a permanent home for the Market lies in the redevelopment of the St Matthew's Quarter and the Council has the opportunity to negotiate a satisfactory outcome with the owners and prospective developers of this area. To this end, discussions should be reopened with St Modwen / Norton and Proffitt to explore the potential to reintroduce the Market into their proposals and programme for the St Matthew's Quarter scheme. Discussions should also continue with Threadneedle regarding the possibility of locating the Market in a reconfiguration of the Old Square Shopping Centre following the relocation of Tesco Metro at the end of 2010;
- Consideration should be given to introducing interim measures to reduce the deterioration of environmental quality in the Old Market Square area following relocation of the Market; and

- Priority should be given to the establishment of a robust operational market management regime to minimise the impact of the new market upon the town centre. Key aspects to be addressed incorporate improvement of the market offer; town centre security, refuse collection, recycling and disposal, street cleansing; storage of goods, market upkeep and repair, and vehicle access.

2.13 The GVA Grimley evidence base informed the submission of two parallel planning applications, for both Options 2 and 3 with Option 2 being refused and Option 3 (the consultant's recommended position) securing temporary planning consent for a one year period in order for the Council to make a judgment as to the impact of its relocation on the overall vitality and viability of the town centre. This consent will expire on 28th October 2010.

2.14 A key objective of this study therefore, is to examine the impact of the current relocation on the viability and vitality of the town centre and explore additional locational options to inform a further planning application that should, if possible, seek a more permanent consent (at least up to three years).

3. POLICY CONTEXT

Introduction and Context

3.1 This section provides a summary of the relevant planning policy context that has informed this Study.

3.2 The election of the Coalition Government in May 2010 has significant implications for the planning system with major reforms imminent. The Government proposes to return decision making powers on housing and planning to local councils through a 'Localism Agenda'. One of the first major reforms was the abolition of Regional Spatial Strategies which came into effect on 6th July when a letter was issued by the Coalition Government confirming the revocation of RSSs with immediate effect.

3.3 The abolition of the RSS may have implications for the status of Walsall as a strategic town centre in the regional hierarchy. However, the advanced stage of the Black Country Joint Core Strategy, which identifies Walsall as one of four strategic centres in the Black Country, should protect its position, once adopted. The uncertainty over future regional funding and priorities through the LEP is likely to be a cause for greater concern in respect of future town centre investment.

3.4 The Government also intends to replace the Regional Development Agencies (such as Advantage West Midlands) by March 2012 with Local Enterprise Partnerships (LEP). These LEP's will set out local economic priorities with the aim of creating the right environment for business growth through tackling issues such as planning, housing, local transport and infrastructure and employment. The implications for public sector support to regeneration projects is unclear at present.

National Planning Policy

Planning Policy Statement 1: Delivering Sustainable Development (2005)

3.5 PPS1 sets out the Government's overarching planning policies on the delivery of sustainable development. It requires local planning authorities to facilitate and promote sustainable and inclusive patterns of urban development by contributing to sustainable economic development, protecting the natural environment and ensuring high quality development through good design and the efficient use of land. It also seeks to ensure that development supports existing communities and contributes to the creation of safe, sustainable, liveable and mixed communities with access to good housing, jobs and key services for all members of the community.

Planning Policy Statement 4: Planning for Sustainable Economic Growth (2009)

3.6 PPS4 was adopted in December 2009 and replaces PPG4 (Industrial, Commercial Development and Small Firms), PPG5 (Simplified Planning Zones), PPS6 (Planning for Town Centres) and economic development sections of PPS7 (Sustainable Development in Rural Areas). The purpose of the merged guidance is to streamline national planning policy to create a coherent and comprehensive policy framework for planning for sustainable economic growth in urban and rural areas, especially in town centres.

3.7 Policy EC4 states that local planning authorities should plan positively to promote competitive town centre environments. This includes '*retaining and enhancing existing markets*', ensuring that they remain attractive and competitive by investing in their improvement.

3.8 Annex D of PPS4 provides a series of town centre health check indicators. These have been used in this Study and are as follows:

- **A1 –** Diversity of main town centre uses;
- **A2 –** The amount of retail, leisure and office floorspace in edge of centre and out of centre locations;
- **A3 –** The potential capacity for growth or change of centres in the network;
- **A4 –** Retailer representation and intentions to change representation;
- **A5 –** Shopping rents;
- **A6 –** Proportion of vacant street level property and the length of time properties have been vacant;
- **A7 –** Commercial yields on non-domestic properties;
- **A8 -** Land values and the length of time key sites have remained undeveloped;
- **A9 -** Pedestrian flows;
- **A10 –** Accessibility;
- **A11 –** Customer and residents views and behaviours;
- **A12 –** Perception of safety and occurrence of crime; and
- **A13 –** State of the town centre environmental quality.

Planning Policy Statement 5: Planning for the Historic Environment (2010)

3.9 This PPS replaces PPG15 (Planning and the Historic Environment) and PPG16 (Archaeology), and places greater emphasis on conserving and enhancing what is significant in heritage terms about a place, rather than protecting an entire area for its own sake. PPS5 also states that Local Planning Authorities (LPAs) should take into account the desirability of a new development making a positive contribution to the character and local distinctiveness of the historic environment.

Planning Policy Guidance 13: Transport (2001)

3.10 PPG13 encourages the creation of an integrated and sustainable transport network in order to lessen environmental impact, reduce growth in the length and number of motorised journeys and reduce reliance on the private car. The use of accessible sites, such as those located within town centres and close to transport interchanges should be maximised and developed intensively. Within town centres, significantly lower levels of off street parking should be provided as part of new development and walking, cycling and public transport should be encouraged instead.

Regional Planning Policy

West Midlands Regional Spatial Strategy (2008)

3.11 As noted earlier, the Coalition Government, as part of its localism agenda, has revoked the Regional Spatial Strategies with immediate effect from 6th July 2010. The evidence base which underpinned the emerging West Midlands Regional Spatial Strategy Phase 2 does, however, remain a material consideration.

Sub-Regional Planning Policy

Black Country Joint Core Strategy Publication Document (2009)

3.12 In November 2009, the Publication document for the Black Country Joint Core Strategy (BCJCS) underwent a period of public consultation, which ended in January 2010. Following this, the document was submitted to the Secretary of State on 26th February 2010 and the Examination in Public is currently taking place, with adoption scheduled for March / April 2011.

3.13 The BCJCS will be the key statutory plan guiding urban renaissance in the Black Country. In light of the abolition of the West Midlands RSS, this Core Strategy will be the only statutory document setting out strategic planning policy at sub-regional level. It sets out the vision, spatial objectives and spatial strategy for future development in the Black Country up to 2026 as well as providing spatial strategies for areas of greatest change, namely, the Regeneration Corridors and Strategic Centres. It will facilitate considerable land use change across the Black Country.

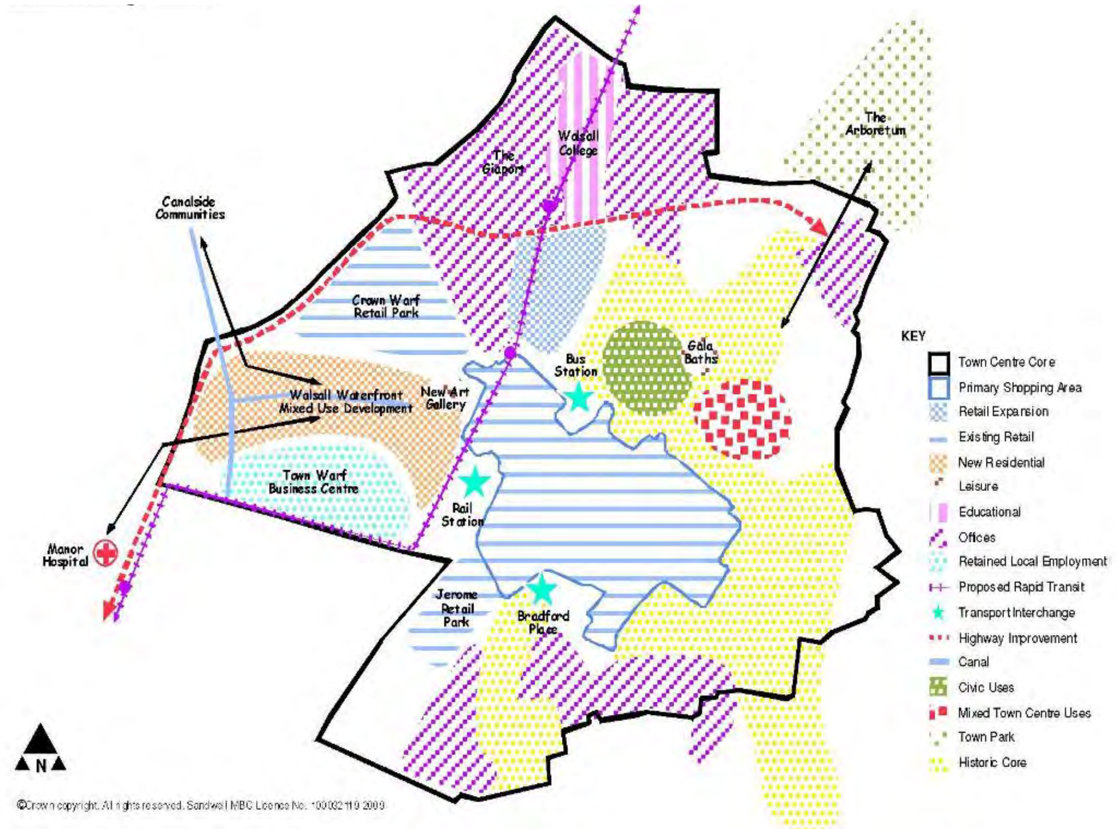
3.14 Policies of particular relevance to Walsall Town Centre are summarised below:

- **Policy CSP1: The Growth Network** **–** Walsall is identified as one of four Strategic Centres. These centres should be the focus for large scale comparison retail and by 2026 will have provided 345,000 sq m gross new comparison retail floorspace;
- **Policy CSP4: Place Making** – The hierarchy of centres will provide a focus for the concentration of essential local services and activities with easy access by walking, cycling and public transport;
- **Policy CSP5: Transport Strategy** – An effective and integrated transport network is required to enable the expansion of Strategic Centres such as Walsall;
- **Policy CEN1: The Importance of the Black Country Centres for the Regeneration Strategy** – The Strategic Centres will provide the main focus for higher-order retail, office and cultural services;
- **Policy CEN2: Hierarchy of Centres** – Reinforces Walsall's position as the Strategic Centre for Walsall Borough;
- **Policy CEN3: Growth in the Strategic Centres** – The Strategic Centres will secure an appropriate share of comparison and convenience retail development. Walsall will be expected to deliver 60,000 sq m of comparison retail floorspace during the period 2006 – 2021 and a further 25,000 sq m during the period 2021 – 2026. In addition, Walsall will be expected to provide 8,000 sq m convenience retail floorspace during the period 2006 – 2021; and
- **CEN4: Regeneration of Town Centres** – Encouraging new provision of convenience retail is of particular importance.

3.15 The Proposals Map for Walsall Strategic Town Centre in the BCJCS Publication document is provided overleaf at **Figure 3.1**. It confirms St Matthew's Quarter as being part of the Primary Shopping Area. The Primary Shopping Area (PSA) is the preferred location for retail development within the Strategic Centre and a major opportunity has been identified for comparison retail development around Digbeth.

3.16 The thrust of retail policy in the Primary Shopping Area, which is to consolidate and improve the existing offer including environmental improvements, is an important consideration in assessing the most appropriate location for Walsall Market.

Figure 3.1: Walsall Strategic Centre Proposals Map



Source: BCJCS Publication Document (2009) (Nb. Not to scale)

3.17 In addition we have also considered the Black Country Centres Study prepared by GVA Grimley (2009) which forms part of the evidence base for the BCJCS. The study provides an assessment of the four strategic centres, including Walsall. It shows that Walsall is out performed by Brierley Hill and Wolverhampton, but has generally performed better than West Bromwich. Further information from this study is provided as part of the town centre assessment.

Local Planning Policy

Walsall Unitary Development Plan (2005)

3.18 The Walsall Unitary Development Plan (UDP) was adopted in 2005. Its policies were saved for three years until March 2008. At this time, only four of the UDP policies were deemed to have expired, the remainder have been saved until they are replaced by policies from the Local Development Framework (LDF) when the BCJCS and other Development Plan Documents are adopted.

3.19 UDP saved policies that are relevant to the St Matthew's Quarter and the wider study area were set out in the GVA Grimley 2009 Report and are summarised in **Appendix B**.

3.20 The key policy of particular relevance to the town centre and the Market are:

- **Policy S2: Hierarchy of Centres –** Walsall is identified as the 'Main Town Centre'. It will be sustained and enhanced in its sub-regional role offering comparison retail and other town centre uses. It is recognised that Walsall has a local role, meeting the needs of adjacent communities for convenience shopping and local amenities and services;
- **Policy WA1: Primary Shopping Areas –** this comprises Park St/Digbeth/High St and extends into Bradford St, Bridge St, Old Square and the Saddlers Centre; redevelopment schemes in Digbeth will be particularly encouraged; and
- **Policy WA2: The Market –** this policy recognises the importance of the Market as an attraction and in meeting the needs of the community. It refers to the need for improvements to the Market and recognises the need to encourage redevelopment in the Digbeth area together with the need for enhancements to the St Matthew's Quarter given the setting they provide to the Market.

3.21 Two key points can be drawn from review of UDP policy. First, the Primary Shopping Area is a focus for new retail floorspace, especially Digbeth / Old Square and Lower Hall Lane; and second, the importance of the Market is recognised and the Council accepts responsibility for improvements to the Market operation and setting to enhance its attractiveness. The improvement of the Market is thus supported by an adopted UDP policy.

'Designing Walsall' Supplementary Planning Document

3.22 The 'Designing Walsall' Supplementary Planning Document (SPD) was adopted in February 2008. It provides advice to developers on the design of all new types of development within the town. This was also referred in to in our 2009 report and the policies are summarised in **Appendix B**.

3.23 The SPD also provides 'Local Character Guidance' on St Matthew's Quarter. The following opportunities are identified:-

- The opportunity to modernise the existing market to create an exciting 21st century offer;

- New retail development should reflect the spacing of medieval plot widths and re-instate the serpentine street along Digbeth;
- Creating a friendly sense of community and neighbourhood through design;
- High quality public realm creating a comfortable outdoor environment for pedestrians and shoppers; and
- Important views of St Matthew's Church must be maintained and enhanced.

Conclusion - Policy Implications

3.24 Since the GVA Grimley St Matthew's Quarter Report in September 2009, the key policy changes have been the publication of PPS4, the abolition of the West Midlands RSS and publication of the submission version of the Black Country Joint Core Strategy. Draft PPS4 and the Preferred Options of the BCJCS were both considered in our previous report. The revocation and subsequent abolition of the RSS was not anticipated, although the implications for Walsall town centre are unlikely to be significant assuming the BCJCS focus on Walsall as one of four strategic centres is held to be sound.

3.25 The BCJCS Publication document encourages the regeneration of Walsall as a Strategic Centre to provide a focus for significant new retail development, as well as essential local services. It also emphasises the importance of easy access by walking, cycling and public transport.

3.26 It is evident that retention and (if required) improvement of the Walsall Market has support in both national policy guidance (at a general level) and, specifically, in local planning policy. Policy WA2 of the Walsall UDP seeks to secure improvement in the Market, albeit the supporting text assumes this would be in its existing location in Digbeth / High Street.

3.27 We note that there are no policies which resist relocation of the Market provided the objectives above are satisfied. The UDP recognises the role of the Market and seeks through its policies to secure improvements to it. Thus, whilst the UDP anticipated the Market would remain in its traditional location at Digbeth, there is no specific policy provision requiring this provided a reasonable planning justification is made to support a proposal for relocation.

4. THE ROLE AND FUTURE OF WALSALL MARKET

4.1 The GVA Grimley 2009 Report provided an overview of the challenges markets are facing nationally; considered whether any lessons could be learned from the operation of other markets, both locally and further afield; explored the role, function and character of the Walsall Market; and investigated the trading position of the market in the context of the relocation proposals. This section revisits that work and identifies where there have been changes over the last nine months.

The National Picture

4.2 The national picture has changed little since we reported in November 2009 and, for completeness, we largely reflect our earlier views in the following paragraphs.

4.3 The Walsall Market is typical of many market operations across the country in that its viability has declined. There is widespread evidence that markets are experiencing falling occupancy accompanied by falling revenues and increasing costs. This is due to two main factors. Firstly, generally speaking, council operated markets under-perform because they are poorly managed and starved of investment. Secondly, unlike the major discount supermarkets, market traders lack basic business planning and retail presentation expertise. This means that they are finding it increasingly difficult to compete, particularly as the large supermarket chains fight harder to maintain market share in the current recession.

4.4 The major supermarkets totally dominate the UK groceries sector, and are now making significant inroads into the non-food sector. They have introduced a number of "budget lines" which are aimed at the cost conscious shopper, but still carry the retailers brand guarantee. Similarly, in the clothing and shoe industries, the emergence of Matalan, Primark, TK Maxx, New Look, as well as the larger supermarkets own designer 'budget' labels, such as George (Asda), TU (Sainsbury's) and Florence & Fred (Tesco) are offering discount priced clothing, but with a known household 'name tag'.

4.5 Some markets have adapted to these changes, and have increased in popularity by introducing 'farmers markets' and European style markets (French, German etc) selling specialist items not necessarily found in high street shops, and antiques / bric-a-brac for customers looking for something different. Other markets have responded by improving management and carrying out improvements to help weather the economic downturn. Nevertheless in broad terms, unless market traders respond to these challenges positively, falling sales turnover and profitability will lead to reducing rent rolls and increasing vacancy rates. Without action, markets such as that at Walsall will start to disappear from our towns as competition increases. Indeed, the closure of Brownhills market at the end of March 2010 bears testament to this.

4.6 It is important to recognise that this outcome could have a substantial adverse impact upon the potential for social inclusion. Walking around almost any market, and Walsall is no exception, will confirm that less privileged sections of society, including the lower paid, elderly and less mobile, rely on the presence of a market and the value for money they provide, in relation to purchase of vital items at a price that they can afford. This social provision is a key reason for council support for market provision, alongside the increased diversity and vitality that a well-run market can introduce to a town centre.

Market Comparisons

4.7 The consultant has been provided with updates sourced by Walsall Council officers following information obtained from a number of outdoor / indoor markets, both locally in the Black Country and elsewhere in the country. Limited responses have been received and these have been incorporated in **Table 4.1** below.

Table 4.1 – Results of Walsall Council Updated Market Survey

Market Location	Operator	Size	Number of Days Open	Comments
Lichfield Outdoor Market	Council	Up to 53 stalls	3 days	Trade is down. There are now 5-9 vacant stalls on Friday's, however full capacity on Tuesday's and Saturday's.
Wolverhampton City Centre Outdoor Market	Council	46 stalls	5 days	Occupancy has reduced slightly in 2010.
Bilston Outdoor Market	Council (Sunday private)	117 stalls	5 days	Occupancy has reduced slightly in 2010.
Wednesfield Outdoor Market	Council	26 stalls	4 days	Occupancy has reduced in 2010.
West Bromwich Outdoor Market	Council	76 stalls	6 days	Rents have been reduced which has benefited traders and increased the number of occupancies. Trade is down.
Wednesbury Outdoor Market	Council	70 stalls	3 days	Rents have been reduced which has benefited traders and increased the number of occupancies. Trade is down.
Bescot Market	Privately operated	250	1 – Sunday (& Bank Holidays)	Estimated trade down by c.30%. Management has responded flexibly to maintain numbers of stalls.

Market Location	Operator	Size	Number of Days Open	Comments
Warrington Indoor Market	Council	250	6 days	Footfall has decreased. A number of local shops have closed and are now occupying market stalls. Takings for food and fresh produce are up.
Worcester (Crown Gate) Outdoor Market	Privately operated	44 stalls	6 days	Relatively unchanged since 2009. Reasonable occupation – trade down due to recession.
Milton Keynes Market	Privately operated	300 stalls	5 days	Trade has not changed in last 12 months. Full occupancy. Management is strict and traders respond well to this.
Kidderminster Market	Private operated	102	2 days	Trade is estimated to be down by c.30%. Flexible management response in relation to rents and stall size but location good in relation to pedestrian flows.

(Source: GVA Grimley, from Walsall Council Survey 2010)

4.8 These responses are more limited in numbers than last year but still provide a flavour of the generally difficult trading conditions. With the exception of Milton Keynes Market, the remainder have seen a decline in occupancy and / or trade, with anecdotal evidence suggesting reductions of circa 30% at Bescot and Kidderminster Markets. It is noted that in some cases, market managers have responded flexibly by, for example, reducing rents in order to help maintain occupancy.

Walsall Market

Context

4.9 Along with most retail markets across the country, and prior to its relocation on 27th November 2009, Walsall Market has seen the number of stalls and therefore its income, decline significantly in recent years. This decline has largely been attributed to national trends, such as the growing influence of supermarkets and discount retailers, as well as the economic downturn and subsequent recession.

4.10 Local issues have, however, also been prominent in this decline, including the Shannon's Mill fire, which led to temporary road closures and disturbance whilst the Mill building was demolished, with similar temporary disturbance during the construction of the Asda store on George Street. Uncertainty and lack of progress with the investment proposals for the wider St Matthew's Quarter redevelopment also lead to an overall deterioration in the environment of the St Matthew's Quarter, which contributed to the decline of the Market. The management regime of the markets service (prior to 27th November 2009) was also a factor in its decline. One of the conditions of the planning consent for the relocation of the Market was to review the market management regime and improve its overall management and the service provided to the traders.

4.11 An improved management regime has been implemented in tandem with the Market relocation. This has included new facades for stalls, better control of litter / recycling, improved goods storage and improved security. This has improved perceptions of the Market and is likely to have been a factor assisting its performance over the last nine months although there is no clear evidence of the extent to which the new regime has contributed.

Role and Function

4.12 The market stalls are currently located in Digbeth and Lower Hall Lane and forms a cross by locating stalls around The Bridge and along Bradford Street as well as positioning eight stalls in Park Street. It now has between 90 and 100 stalls (an overall increase since its relocation) and continues to trade on Monday / Tuesday / Wednesday / Friday / Saturday. The Market trades from fixed stalls and emergency access / servicing is provided from adjacent streets, principally Lower Hall Lane.

4.13 The Market generally sells low cost (mainly unbranded) products and consequently attracts shoppers seeking value for money items. Produce for sale remains the same as previously reported and includes CD / DVD's, fresh fruit and vegetables, household goods, books, small electrical equipment, kitchenware, shoes, sweets, toys, plants and toiletries. Hot food and specialist services such as fortune telling are also offered. There are a number of second hand goods for sale, as well as 'exchange' activities (e.g. for DVDs) reflecting the requirements of key customers.

Performance

Occupancy

4.14 **Table 4.2** below illustrates the average market occupancy rates for April through to June 2009 (pre market relocation) compared to the same period in 2010 (post market relocation).

Table 4.2: Walsall Market - Average Market Occupancy Rates (April – June)

	Monday	Tuesday	Wednesday	Friday	Saturday
Pre market relocation (2009)	63%	81%	64%	78%	78%
Post market relocation (2010)	73%	90%	69%	90%	88%

Source: Original data supplied by Walsall MBC 2010

4.15 The data shows that the most popular trading day is Tuesday and the least popular trading days are Monday and Wednesday. The greatest increase in average occupancy has been on a Friday (+12%) such that since the relocation of the Market, Friday is now equally as popular as Tuesday with market traders.

4.16 Data provided by Walsall Council for the week ending 19th June 2010 indicates that there are a maximum number of 100 market stalls / pitches in the current Market configuration. The occupancy during this week varies dependant on the day, with the busiest being the Tuesday where there were only three vacancies (97% occupancy). The next most popular trading days in this week were Friday (seven vacancies, 93% occupancy) and Saturday (11 vacancies, 89% occupancy). In this week the least popular trading days were Monday (21 vacancies, 79% occupancy) and Wednesday (35 vacancies, 65% occupancy).

4.17 In order to try to establish if the increase in occupancy is a consequence of the relocation and associated improvements, we compared the performance of Walsall Market to other local markets where management improvements have not been implemented. **Table 4.3** below illustrates the percentage change in market occupancy in Walsall, as well as other local markets.

Table 4.3: Percentage Change in Average Market Occupancy Rates (April – June)

	Monday	Tuesday	Wednesday	Friday	Saturday
Walsall	+10%	+9%	+5%	+12%	+10%
Willenhall	-	-	0%	+13%	0%
Bloxwich	-	+3%	-	+7%	+7%
Darlaston	-	-	-	-5%	-10%

Source: Original data supplied by Walsall MBC 2010

4.18 The table shows that Bloxwich has seen an increase in occupancy levels of 3% (Tuesdays) and 7% (Friday and Saturday). Willenhall's occupancy has remained static except on a Friday where levels have risen by 13%. Darlaston is the only market (aside from Brownhills which closed in March 2010) to experience a decline in occupancy levels with figures falling on a Friday and Saturday by 5% and 10% respectively.

4.19 The table reveals a mixed picture but shows that Walsall Market's new location is popular with stall holders and has attracted new occupiers throughout the week, including four stall-holders from Brownhills Market. This increased occupation may be a result of the new management regime and the continuing fragile economic conditions where shoppers prefer value goods. The size of the increase in occupancy suggests, however, that the relocation and the improvements are key factors contributing to a rise in occupancy over and above others in the Borough.

Type of Trader

4.20 **Tables 4.4** and **4.5** illustrate the percentage of permanent and casual traders in the same week in June 2009 and 2010 respectively.

Table 4.4: Walsall Market – Permanent / Casual Traders w/c 20.06.09

	Monday	Tuesday	Wednesday	Friday	Saturday	Average
Permanent	91%	52%	92%	51%	61%	68%
Casual	6%	48%	8%	49%	32%	32%

Source: Original data supplied by Walsall MBC 2010

Table 4.5: Walsall Market - Permanent / Casual Traders w/c 21.06.10

	Monday	Tuesday	Wednesday	Friday	Saturday	Average
Permanent	99%	99%	99%	98%	97%	98%
Casual	1%	1%	1%	2%	3%	2%

Source: Original data supplied by Walsall MBC 2010

4.21 The two tables above illustrate a significant decrease in the number of casual traders throughout the week with the average falling from 32% in June 2009 to just 2% in June 2010. This demonstrates that the Market has grown stronger in terms of permanent traders since its relocation in November 2009.

Turnover

4.22 The 2004 householder's survey for Walsall (Walsall Council) indicated a turnover figure of circa £349m for comparison goods per annum in the town centre. More recent data from the Black Country Centres Study indicates a turnover figure of c. £293m for comparison goods.

4.23 In the absence of any data on stall holder's average income, we have made assumptions about average income per stall to generate an indication of turnover. Last year we assumed a daily income of between £400-500 per stall, after expenses. This translated into a total income in the order of £8m or 2% of total comparison turnover in the town centre. If income has remained the same, this would translate into 2.7% of comparison spend in view of the reduction in comparison spend overall. Anecdotal evidence from the market traders suggests, however, that trade is down by an average of 25-30%, reflecting the experience of other markets and the impact of the recession. This suggests that turnover will be in the region of £6-7m this financial year or about 2.2% of total comparison spend.

4.24 Whilst this comparison is at a very general level, it provides a broad indication of the scale and importance of the Market when compared with the turnover of the wider town centre. It serves as a reminder that although the Market adds vitality and diversity, it is relatively small in terms of overall comparison expenditure in the town centre and it remains important to ensure that the location of the Market does not adversely affect overall trading performance.

This assessment of turnover does not, however, reflect other non-financial considerations, including the social inclusion and retail diversity benefits referred to elsewhere in this section.

Rental Income

4.25 Data provided by Walsall Council on average daily rental income generated by the Market shows that income declined between 2005 and 2008/09 before recovering in 2010 and into this financial year.

4.26 Whilst rental income does not necessarily correlate with turnover of the stall-holders, it provides a positive indication of the well-being of the Market reflected by its expansion in number of stalls and the increase in permanent stall-holders.

Conclusion

4.27 On the basis of this assessment, it is concluded that Walsall Market continues to play a relatively small (in financial terms) but important role in maintaining the health of the town centre by virtue of its social inclusion role and the benefits it brings in terms of greater vibrancy and diversity. Since relocation of the Market in November 2009 it appears that traders have suffered the effects of the recession on their income although we have not been able to corroborate this. However, its overall vitality and viability has increased with a greater number of stalls being let and an increase in the number of permanent traders. What is less clear, however, is to what extent its expansion is a consequence of its relocation and how much is a reflection of other factors, including the improved market appearance, environment and management; and general economic influences on customer spending patterns. Nevertheless, the performance of the Market compared to others within the Borough suggests that the relocation coupled with the improved management have been contributory factors. The continued effective management and operation of the Market in its current or revised location will be key going forward to ensure that its viability is maximised and that these factors do not detract from the wider quality and appearance of the town centre retail 'offer' as a whole.

5. TOWN CENTRE HEALTH CHECK (VITALITY AND VIABILITY) ASSESSMENT

5.1 This section assesses the performance of the town centre when tested against the health check indicators outlined in Annex D of PPS4 (see **Table 5.1**). We have sub-divided these indicators into five groups for the purposes of assessment as indicated below.

Table 5.1: Indicators for Town Centre Vitality and Viability Health Check Assessment

Ref	Sub-Heading and Indicators
Retail Hierarchy and Catchment	
A1	Diversity of main town centre uses
A2	The amount of retail, leisure and office floorspace in edge of centre and out of centre locations
Growth Prospects and Retail Demand	
A3	The potential capacity for growth or change of centres in the network
A4	Retailer representation and intentions to change representation
Performance of the Town Centre	
A5	Shopping rents
A6	Vacancies
A7	Commercial yields
A8	Land values
Town Centre Movement	
A9	Pedestrian flows
A10	Accessibility
Town Centre Perceptions	
A11	Customer and residents views and behaviours
A12	Safety and occurrence of crime
A13	State of the town centre environmental quality

Source: PPS4 Annex D (2009)

5.2 Using the above indicators, the consultant has drawn together the baseline information that has been gathered to inform this Study, in particular the assessment of the overall vitality and viability of the centre. Where changes have occurred from the 2009 evidence we have identified these. In collating and analysing this data we have supplemented existing centre information (especially health check indicators) with empirical data updated from site surveys. As previously discussed, it is recognised that it is essential that this evidence base provides authoritative conclusions and is, as a result, capable of withstanding forensic legal examination.

Study Area

5.3 It was agreed at the inception meeting for this study on 21st June 2010 that the boundary of the study area remains the same as the boundary for the original study. This is shown in **Figure 5.1** overleaf and incorporates the Primary Shopping Area as identified in the UDP, plus the Crown Wharf area.

Retail Hierarchy and Catchment

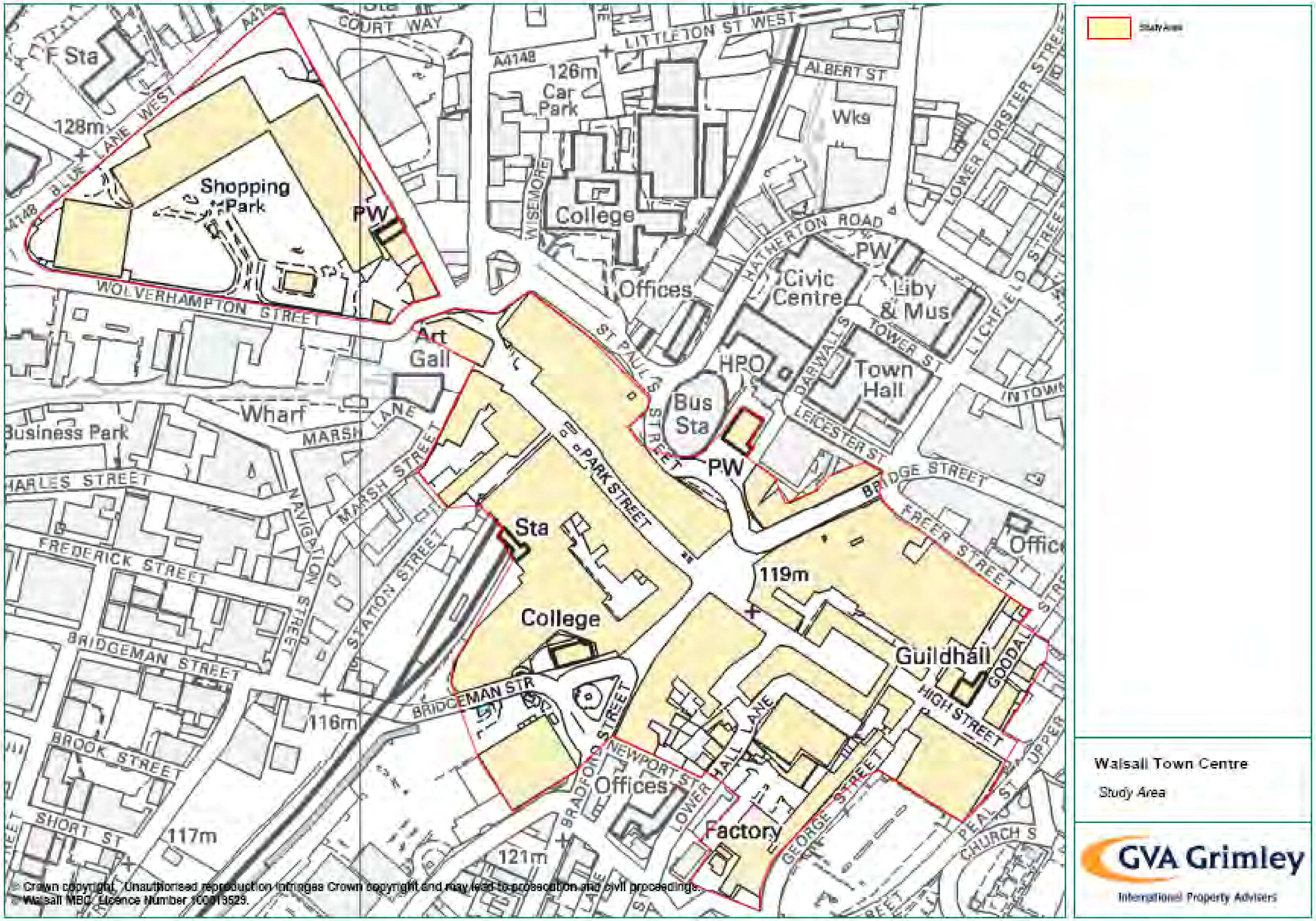
5.4 Walsall serves an extensive primary catchment area that includes most of the Borough, extending to Cannock in the north and to the edge of West Bromwich to the south. According to the PROMIS Live Retail Report (June 2010) the primary catchment area has a total population of 417,000 (411,000 in 2009) which is significantly above the major town average, ranking it 52nd out of all the PROMIS Centres.

5.5 The Walsall population is one of the least affluent of the PROMIS catchments ranking 187th out of 200 centres and is below the major town average. This is a further decline from the 2009 evidence which ranked the area as 175th. There are, however, variations with some areas being less affluent and some more prosperous.

5.6 The estimated shopping population of those who use the town as their major shopping destination is 190,000 (209,000 in 2009). Whilst this has fallen from 2009, it levels still remains above both the PROMIS average of 186,000 and the CBRE Shopping Population Report (2006) average of 148,000. Walsall is projected to see a modest decline in population up to 2013 and, as the previous section demonstrated, it has seen a further decline in the affluence and its attractiveness as a shopping destination with a fall in comparison goods turnover.

5.7 Walsall Town Centre faces above average levels of competition, ranking 167th out of the PROMIS Centres. Walsall's largest competing centre is Birmingham; however it also faces competition from a number of other centres including Sutton Coldfield, Lichfield and the Merry Hill Shopping Centre. It also faces considerable competition in comparison shopping from out of centre shopping destinations, as explained later in this section.

Figure 5.1: Study Area



(Source: GVA Grimley, 2010)

The Town Centre

Overview

5.8 Town centre retail floorspace is estimated at 133,000 sq m (1.22 million sq ft) (PROMIS June 2010), which is above the major town average.

5.9 Walsall Town Centre's retail provision is not extensive and is fairly mainstream. Up-market and speciality retailing is limited, although there are a few independent speciality retailers concentrated in Digbeth Arcade, which is located off Bradford Street.

5.10 Walsall has a slightly below average volume and quality of retail provision relative to the size and affluence of the shopping population.

5.11 GVA Grimley's Black Country Centres Study (2009) indicates that Birmingham exerts a strong draw on the eastern part of the Black Country, including Walsall. It is also apparent that out-of-centre retail provision accounts for a more significant proportion of available expenditure in this area. Against this competition, it is evident that Walsall is unable to achieve the same levels of market penetration within its core catchment, or serve a more extensive catchment area than other Black Country centres such as Wolverhampton and Brierley Hill. Walsall therefore needs to significantly reinforce the higher order role of its town centre if it is to continue to function as a genuinely strategic centre for this area.

The Retail Offer

5.12 The comparison offer has not changed significantly since our 2009 assessment. The town has a below average proportion of managed floorspace according to PROMIS (June 2010) with around 27% taken by three managed shopping centres of the Saddlers, Old Square and Park Place.

5.13 The prime pitch in Walsall, which commands the top Zone A rentals, includes pedestrianised Park Street from The Bridge to Station Street. Key occupiers in this location include Marks and Spencer and Boots.

5.14 The town has a relatively compact central shopping area, comprising three principal streets - Bradford Street, High Street and Park Street - all of which radiate outwards from The Bridge, a central pedestrianised area. These provide the secondary retail offer. Bradford Street has a few national multipliers (e.g. Birthdays and Shoe Zone), with the majority of occupiers being local / independent traders.

5.15 Walsall's sole department store is Debenhams, which trades on two floors in the Old Square Shopping Centre. Concessions within this store are primarily mainstream fashion retailers.

Key variety stores in the town are Bhs and Marks & Spencer; the former Littlewoods unit is now occupied by New Look and the former Woolworths unit by TJ Hughes.

5.16 Convenience provision in the town was boosted by the arrival of the 11,338 sq m (122,000 sq ft) Asda store at the end of the High Street in 2007. There is also a Tesco Metro Store in the Old Square Shopping Centre. However, development is currently underway for an 11,148 sq m Tesco Extra Store at the former Walsall College site on the edge of the Primary Shopping Area. The store is due for completion by Christmas 2010, freeing up its current store as part of the proposed redevelopment of the Old Square Shopping Centre.

Town Centre Uses

5.17 We have undertaken an analysis of the floorspace occupied within the Study Area, utilising Use Classes A1-5 of the Classes Order, as follows (**Table 5.2**):

Table 5.2: Use Classes Order (A Class)

Use Class	Use / Description of Development	Permitted Change
A1 Shops	The sale of goods (other than hot-food) to the public: shops, post offices, travel agencies, ticket agencies, hairdressers, funeral directors, undertakers, domestic hire shops, dry cleaners, internet cafes, sandwich bars (where cold food is to be consumed of the premises).	No permitted change
A2 Financial and Professional Services	Financial services: banks, building societies, and bureau de change. Professional services (other than health or medical): estate agents, employment agencies, betting shops, other services it is appropriate to provide in a shopping area.	A1 (where there is a ground floor display window)
A3 Restaurants & Cafes	Restaurants & cafes (i.e. places where the primary purpose is the sale and consumption of food and drinks on the premises).	A1, A2 or A3
A4 Drinking Establishments	Public house, wine bar or other drinking establishments (i.e. premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises).	A1, A2 or A3
A5 Hot Food Take-Away	Take-aways (where the primary purpose is the sale of hot food for consumption off the premises).	A1, A2 or A3

Source: The Town and Country Planning (Use Classes) Order 1987 and the Town and Country Planning (Use Classes) (Amendment) (England) Order 2005.

5.18 The output of this analysis is presented below in **Tables 5.3** and **5.4** below:

Table 5.3: Floorspace occupied by Use Class

Location	A1 Sq m	A2 Sq m	A3 Sq m	A4 Sq m	A5 Sq m	Other (non-retail) Sq m	Vacant Units Sq m	Total (sq m)
Crown Wharf Retail Park	16,690	-	410	-	-	-	-	17,100
Park Street (excl Saddlers Centre & Quasar Centre)	12,860	1,15 0	-	150	690	-	520	15,370
Quasar Centre	7,200	-	-	-	-	-	750	7,950
Saddlers Centre	10,760	-	290	-	-	-	1,540	12,590
Rear of Park Street	180	-	40	-	-	410	260	890
Station Street	500	110	-	-	-	-	-	610
The Bridge / Bridge Street (inc Tesco)	5,980	2,57 0	-	100	-	380	740	9,770
Bradford Street / Bradford Place (excl Digbeth Arcade)	7,240	520	-	430	-	100	100	8,390
Digbeth Arcade	1,040	-	110	-	-	-	490	1,640
Digbeth (inc Market Store)	3,280	210	-	-	-	580	6,060	10,130
Lower Hall Lane	700	-	80	-	90	-	590	1,460
High Street (inc Asda)	7,520	-	550	310	-	-	530	8,910
George Street (excl Asda)	770	-	-	-	-	-	640	1,410
Goodall Street	230	30	250	-	-	760	580	1,850
Old Square Shopping Centre (excl Tesco)	4,790	-	-	-	90	-	750	5,630
Freer Street	70	70	-	-	370	180	290	980
Total (sq m)	**79,810**	**4,66 0**	**1,730**	**990**	**1,240**	**2,410**	**13,840**	**104,680**

Source: GVA Grimley, 2010

Table 5.4: % Floorspace Occupied by Use Class at Each Location

Location	A1	A2	A3	A4	A5	Other (non-retail)	Vacant Units
Crown Wharf Retail Park	97.6%	-	2.4%	-	-	-	-
Park Street (excl Saddlers Centre & Quasar Centre)	83.6%	7.5%	-	1.0%	4.5%	-	3.4%
Quasar Centre	90.6%	-	-	-	-	-	9.4%
Saddlers Centre	85.4%	-	2.3%	-	-	-	12.3%
Rear of Park Street	20.2%	-	4.5%	-	-	46.1%	29.2%
Station Street	82.0%	18.0%	-	-	-	-	-
The Bridge / Bridge Street (inc Tesco)	61.2%	26.3%	-	1.0%	-	3.9%	7.6%
Bradford Street / Bradford Place (excl Bradford Arcade)	86.3%	6.2%	-	5.1%	-	1.2%	1.2%
Digbeth Arcade	63.4%	-	6.7%	-	-	-	29.9%
Digbeth (inc Market Store)	32.4%	2.1%	-	-	-	5.7%	59.8%
Lower Hall Lane	47.9%	-	5.5%	-	6.2%	-	40.4%
High Street (inc Asda)	84.4%	-	6.2%	3.5%	-	-	5.9%
George Street (excl Asda)	54.6%	-	-	-	-	-	45.4%
Goodall Street	12.4%	1.6%	13.5%	-	-	41.1%	31.4%
Old Square Shopping Centre (excl Tesco)	85.1%	-	-	-	1.6%	-	13.3%
Freer Street	7.1%	7.1%	-	-	37.8%	18.4%	29.6%
%	**76%**	**5%**	**2%**	**1%**	**1%**	**2%**	**13%**

Source: GVA Grimley, 2010

5.19 **Table 5.3** shows that there is a total of 104,680 sq m (1.13 million sq ft) of unit floorspace within the study area (including both the identified Primary Shopping Area and the Crown Wharf Retail Park). Of this unit floorspace, circa 76% is occupied by Use Class A1 (shops). 13% of the total unit floorspace in the study area is currently vacant (see **Table 5.4**).

5.20 The Crown Wharf Retail Park and Park Place Shopping Centre (formerly the Quasar Centre), have a unit floorspace which is over 90% occupied by Use Class A1 activities. However, in the case of Park Place Shopping Centre, this figure is dominated by the large Wilkinson's store.

5.21 The area with the largest amount of A2 (Financial and Professional Services) floorspace is the Bridge and Bridge Street area with 26.3% of its floorspace falling within this Use Class, a slight increase from the 2009 study. This area also has the largest amount of A4 (drinking establishments) floorspace with 5.1% of unit floorspace falling within this Use Class. However, this has reduced from 10% at the time of the 2009 study.

5.22 Goodall Street contains the highest proportion of Use Class A3 (restaurants and cafes) floorspace with 13.5% of unit floorspace falling within this Use Class. At the time of the 2009 study, the Saddlers Centre contained the highest proportion of Use Class A3 floorspace with cafes occupying some 18% of the total space, however this has reduced to 2.3% following a number of closures within the centre. Lower Hall Lane still contains the largest amount of Use Class A5 (hot food take-away) floorspace with 6.2% (due mainly to the presence of a large fish and chip shop).

5.23 The amount of vacant floorspace in the study area has decreased significantly since the 2009 study. The Digbeth Area and Lower Hall Lane still have the greatest amount of vacant unit floorspace (59.8% and 40.4% respectively), and are now joined by George Street (excluding Asda) with 45.4% of its floorspace now vacant. However, the figure for the Digbeth area is increased by the large vacant market store unit which we understand has been condemned by the Council. As with the 2009 study, both Crown Wharf Retail Park and the Station Street area currently have no vacant units.

Edge of Centre Uses

5.24 The Borough of Walsall has a high proportion of out of town retailing, largely located along the M6 corridor at, or between J9 and 10 which in certain sectors provide significant competition to the town centre's retail offer. Most of this provision is in the form of retail warehousing.

Retail Warehousing

5.25 According to PROMIS (June 2010) there is a supply of 125,600 sq m (1.35 million sq ft) of retail warehousing space which is above the average provision per household for comparator towns. This represents a reduction from the August 2009 data of 134,758 sqm (1.45 million sq ft). Most goods categories are over represented i.e. electrical, furniture and fashion whereas goods for sport, children and DIY are under represented. Around 61% (58% in 2009) of total retail warehousing floorspace in the Walsall area is on retail parks, which is above the average for major towns.

5.26 The largest concentration of retail warehousing (46,468 sq m - 500,000 sq ft) is located at Axletree Way at Junction 9 of the M6 (Gallagher Retail Park). Key occupiers include Next, Curry's and PC World. In addition, IKEA and B&Q trade from large, nearby stores. There is a large vacant unit of 4,645 sq m (50,000 sq ft) being marketed at Gallagher Retail Park for B1 / B8 uses.

5.27 Other locations / occupiers of note in the area include Broadwalk Retail Park (Halfords, Matalan, Pets at Home, Comet and potentially, following a recent appeal decision, Argos), Reedswood Retail park (Dunelm, Focus, Matalan and Lidl), Keyway Retail Park (Staples, Blockbuster and Burger King) and Jerome Retail Park (Gala Bingo, Iceland and Pound Stretcher).

5.28 The 2009 Black Country Centres Study (GVA Grimley) states that out of town comparison goods turnover in Walsall Borough is the highest in the Black Country at £115.7 million. This converts to a density of £2,721 per sq m which is second only to West Bromwich at a density of £4,393 per sq m. This demonstrates that out of town comparison retail in Walsall is performing well and providing strong competition for the town centre.

Leisure Parks

5.29 Leisure park provision is limited to that provided at J10. **Table 5.5** below identifies the main uses located at J10.

Table 5.5: Uses at M6, J10 Retail Park

Type	Occupiers
Retail / A uses	Marks and Spencer Outlet Store; Boundary Mill Store; Chiquitos Restaurant; BB's Coffee Shop; Cinnamon Court and one vacant shop to let.
Leisure	Showcase Cinema and Governor Casino
Industrial	Boltlight Hydraulic Bolt Tensioning; Telenet; Bauformat Kitchens; Tilemaze; Brushstrokes Graphics and B8 units to let (5,280 sq ft)
Other	Volvo Car Showroom; and Sub Station

(Source: GVA Grimley, 2009)

Superstores

5.30 According to PROMIS (June 2010) there is 117,100 sq m (1.26 million sq ft) of convenience retail floorspace in the area, which is above average provision per household. There are 10 superstores trading in the Walsall area (Asda - 4, Morrison's – 2, Sainsbury's – 2, Tesco – 1 and Co-Op – 1). As previously noted, the Tesco store will be replaced by a new edge of town centre store later this year. In addition there are a number of supermarkets, with both Somerfield and Iceland well represented, alongside other low priced retailers such as Aldi and Lidl. This information is consistent with the 2009 data provided in the previous report.

Growth Prospects and Retail Demand

Development Opportunities

5.31 The main development opportunity in the Study Area incorporates the vacant site of the former Shannon's Mill complex which is part of the Norton and Proffitt / St. Modwen's proposals. Whilst undertaking the previous 2009 Study, it was our understanding that within the Norton and Proffitt / St Modwen scheme proposals was the option to provide a new Market area as part of a mixed use redevelopment scheme for the St Matthew's Quarter. In view of the continuing poor economic outlook we understand that these proposals have been shelved for the time being.

5.32 We understand, however, that discussions are continuing between the Council and St Modwen to undertake a short to medium term refurbishment scheme which could include the demolition of the multi storey car park within the body of their site and the modernisation of the façade of the retail units facing Digbeth and Lower Hall Street. This would be limited to the demolition of the existing market stores building and the laying out of a temporary car park in its place.

5.33 As we reported in 2009, Tesco are set to vacate their current unit within the Old Square Shopping Centre and relocate to their new 11,152 sq m (120,000 sq ft) store on the former Walsall College site. It is expected that this new store will open prior to Christmas 2010.

5.34 Following the move by Tesco to their new store, the current Metro store within Old Square Shopping Centre will become available for redevelopment. Threadneedle Property Investments on behalf of Zurich Assurance have capitalised on this opportunity and produced a strategy for the rejuvenation of their shopping centre which includes the creation of new store units mainly taking the space currently occupied by Tesco, one of which will have a frontage onto Digbeth. In addition, it is intended to demolish the bridge link that currently impedes a clear sight line for pedestrians walking between Bridge Street and Upper High St.

5.35 The overall effect of Threadneedle's proposals will be to upgrade the retail offer in and around Digbeth which it is anticipated will lead to a higher level of footfall around that area of the town centre. It could also offer a longer term opportunity to provide a modern and attractive 'home' for the market traders.

5.36 In 2009 we understood that Investa, the owners of The Saddlers Centre, were considering reconfiguring part of their scheme as Argos were proposing a move to a new edge of town location. However, we are now advised by Investa that Argos will remain in the centre and there are no plans to reconfigure this area.

Demand

5.37 According to PROMIS, in June 2010 there were 10 reported requirements (eight in 2009) for Walsall which remains below the average of 19 for other centres, ranking the town 118th out of 200 centres. This is an improvement on 2009 data which ranked the town just in the lower quartile of centres as 150th out of 200 comparable centres. This is low for a town of its size and status, but reflects in part the continuing economic uncertainty and the extent of competition of larger such as Birmingham and Merry Hill as well as the out of centre competition.

5.38 During 2009 we were aware of Primark's requirement for a unit within the town centre which we understand will be satisfied within the town centre.

5.39 As at May 2010, we are aware that there are key requirements for the town centre from, amongst others, WH Smiths. Further, we understand that there is demand from A3 operators (Ask, Costa Coffee and Pizza Express) for space in the town.

Retailer Representation

5.40 As indicated in **Tables 5.3** and **5.4**, the majority of usage in the town centre (76%), is, as expected, taken up by retail shops (A1 Use Class). This is a slight increase on the 2009 figure of 70%. The consultant has surveyed the whole of the Study Area and there follow a series of plans (**Figures 5.2-5.8**) which indicate the retailers represented in the centre:

- **Figure 5.3: Plan 1 – Crown Wharf Retail Park** shows that this area solely comprises A1 shops, with the exception of one Use Class A3 use (restaurants and cafes);
- **Figure 5.4: Plan 2 – Walsall Town Centre A** illustrates the Park Street region of the study area. This area largely consists of Use Class A1 shops. The Park Street frontage largely consists of large High Street retailers including Marks and Spencer, Boots, New

Look and British Home Stores. Although there are a number of vacant units, these are largely located away from the Park Street frontage;

- **Figure 5.5: Plan 3 – Walsall Town Centre B** illustrates the area to the south of the existing markets area and includes a large Asda supermarket and a large vacant site. There are a large number of charity shops and hair and beauty units in this area, as well as a significant number of vacant units;
- **Figure 5.6: Plan 4 – Walsall Town Centre C** highlights the markets area along with Bridge Street and Old Square Shopping Centre. This area consists of two large A1 units (Tesco and Debenhams) and a concentration of uses within Class A2 (Financial and Professional Services) along The Bridge and Bridge Street. There are also a large number of vacant units;
- **Figure 5.7: Plan 5 – Park Place Shopping Centre First Floor** shows the retail units above Wilkinson's, Poundland and Boots as highlighted by Plan 2 (**Figure 5.4**). With the exception of Wilkinson's, occupiers are generally local and there are a number of vacant units; and
- **Figure 5.8: Plan 6 – Saddlers Centre Lower Ground Floor** largely comprises A1 uses with the exception of two A4 uses and seven vacant units. Occupiers are largely High Street retailers including Argos, Boots and the Early Learning Centre, with some smaller retailers such as Diva Clothing and T H Baker Jewellery.

Figure 5.2: The Study Area Inset Plans (Source: GVA Grimley, 2009)

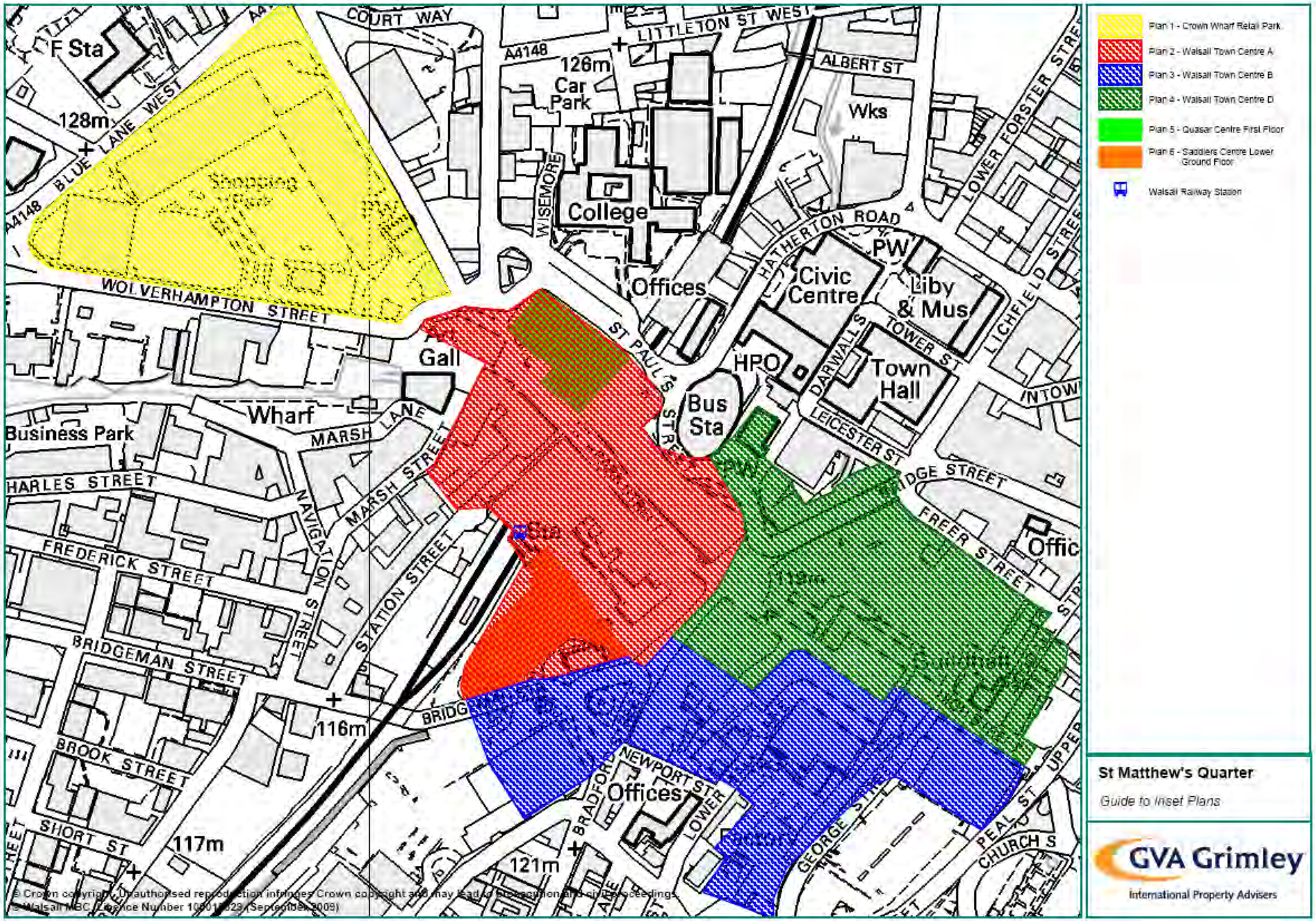
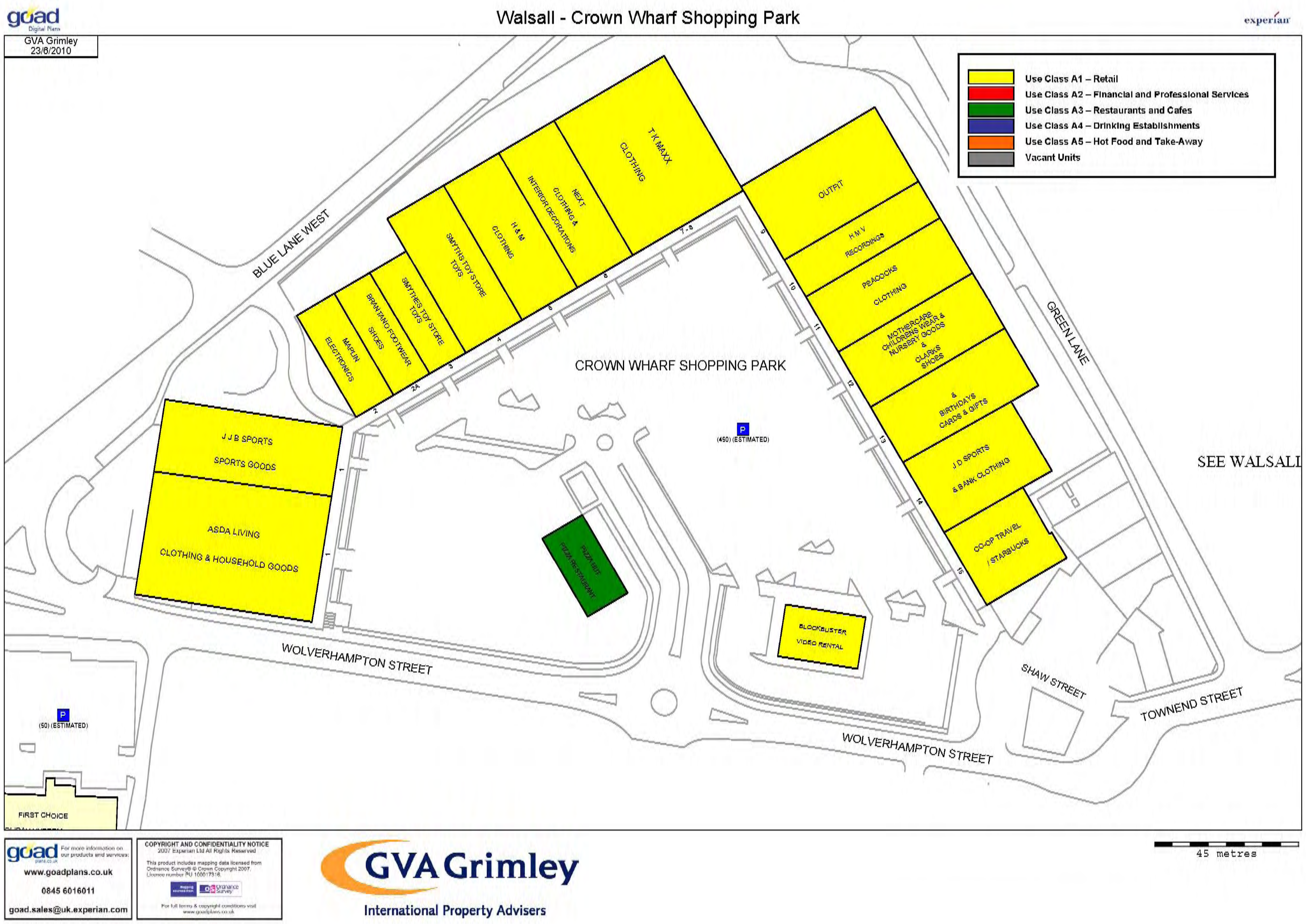
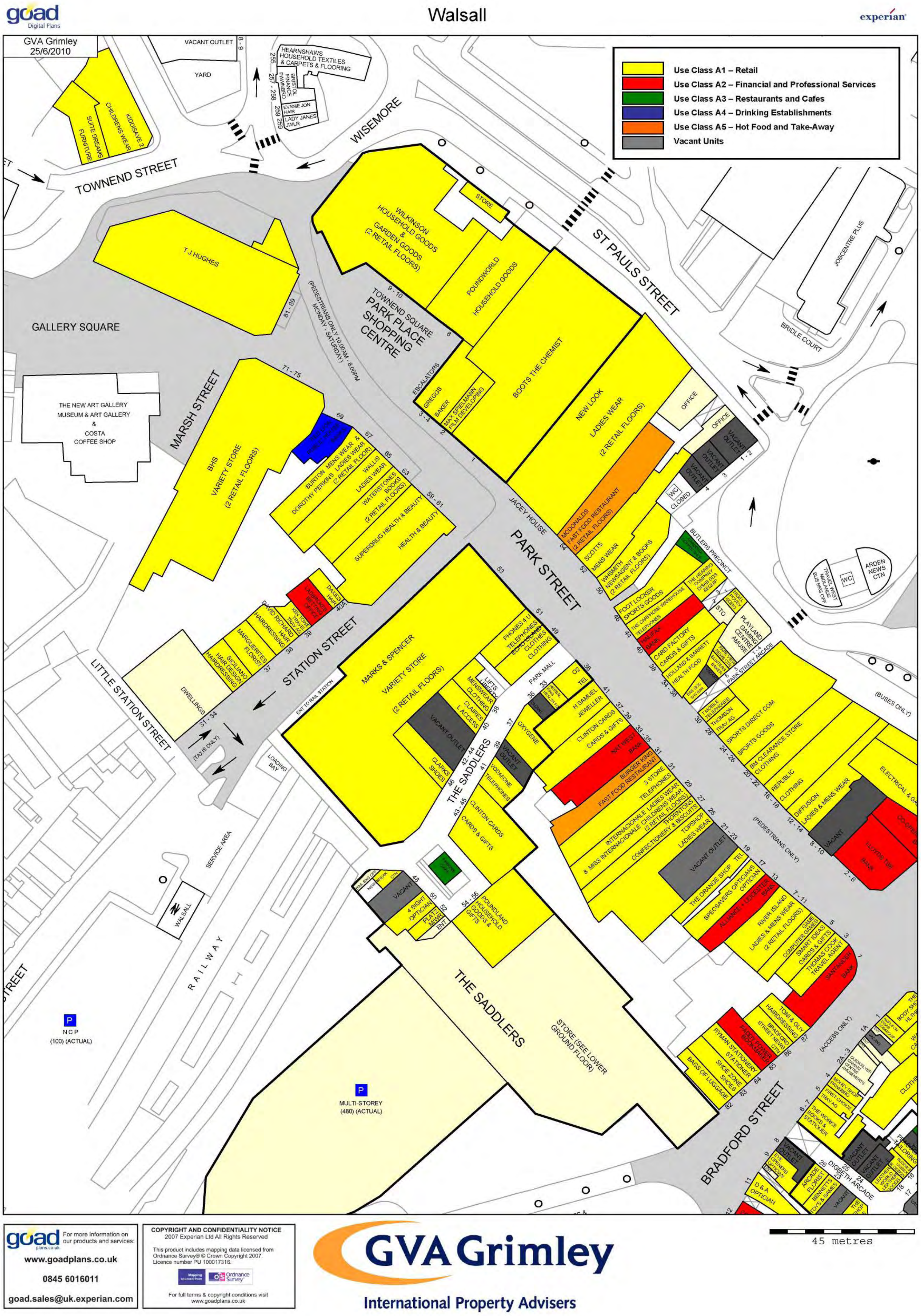


Figure 5.3: Plan 1 – Crown Wharf Retail Park



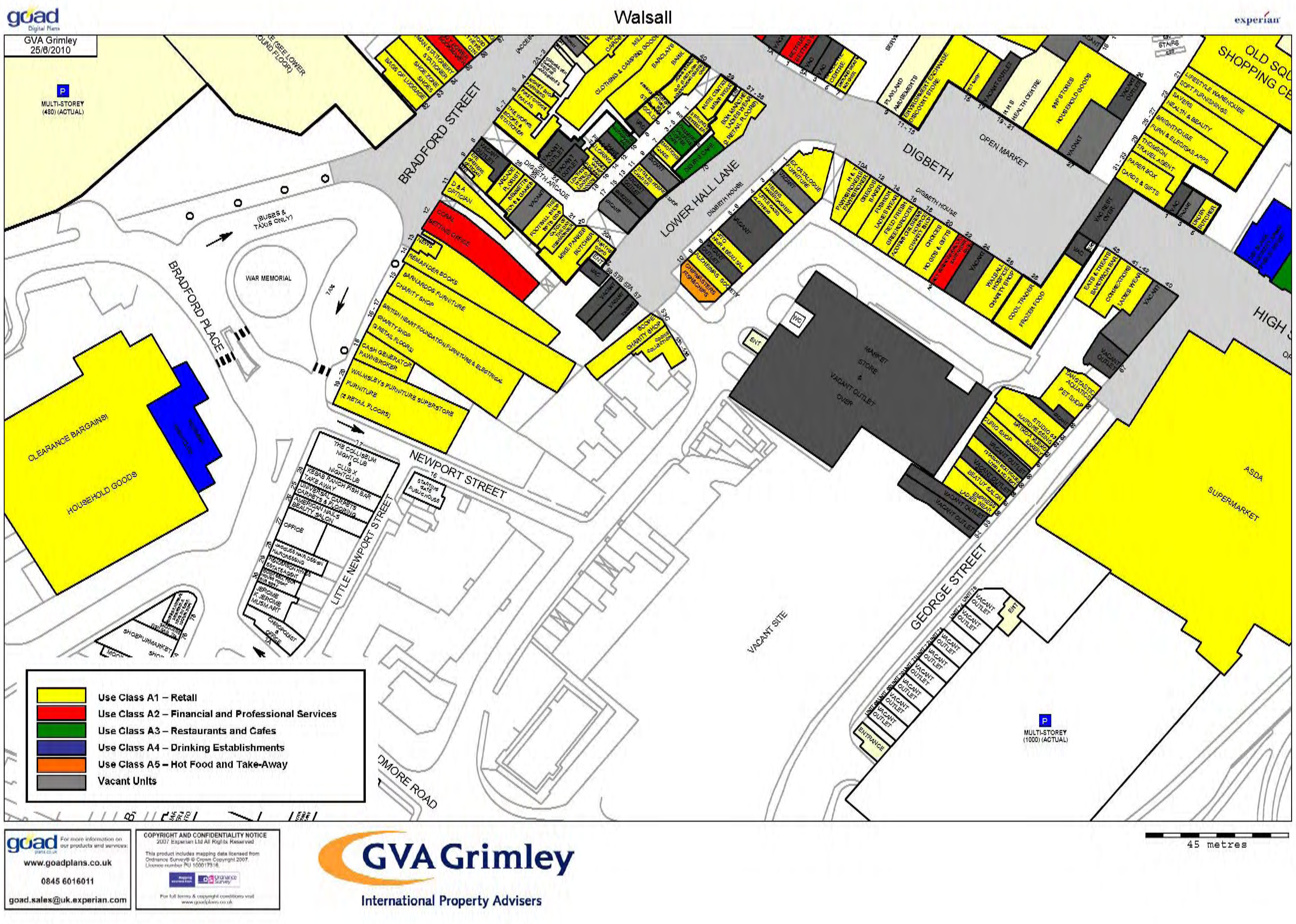
(Source: GVA Grimley via GOAD, 2010)

Figure 5.4: Plan 2 – Walsall Town Centre A



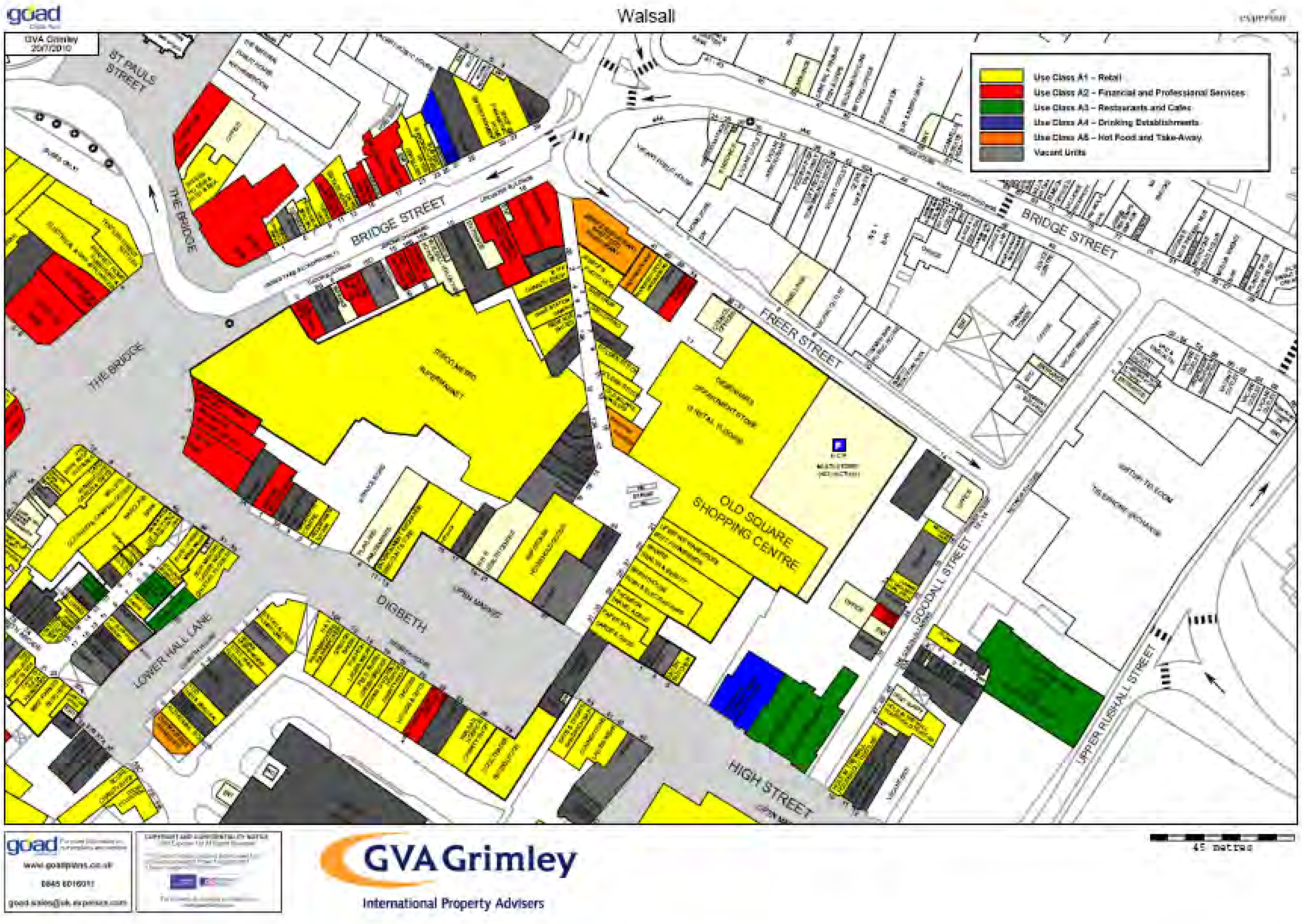
(Source: GVA Grimley via GOAD, 2010)

Figure 5.5: Plan 3 – Walsall Town Centre B



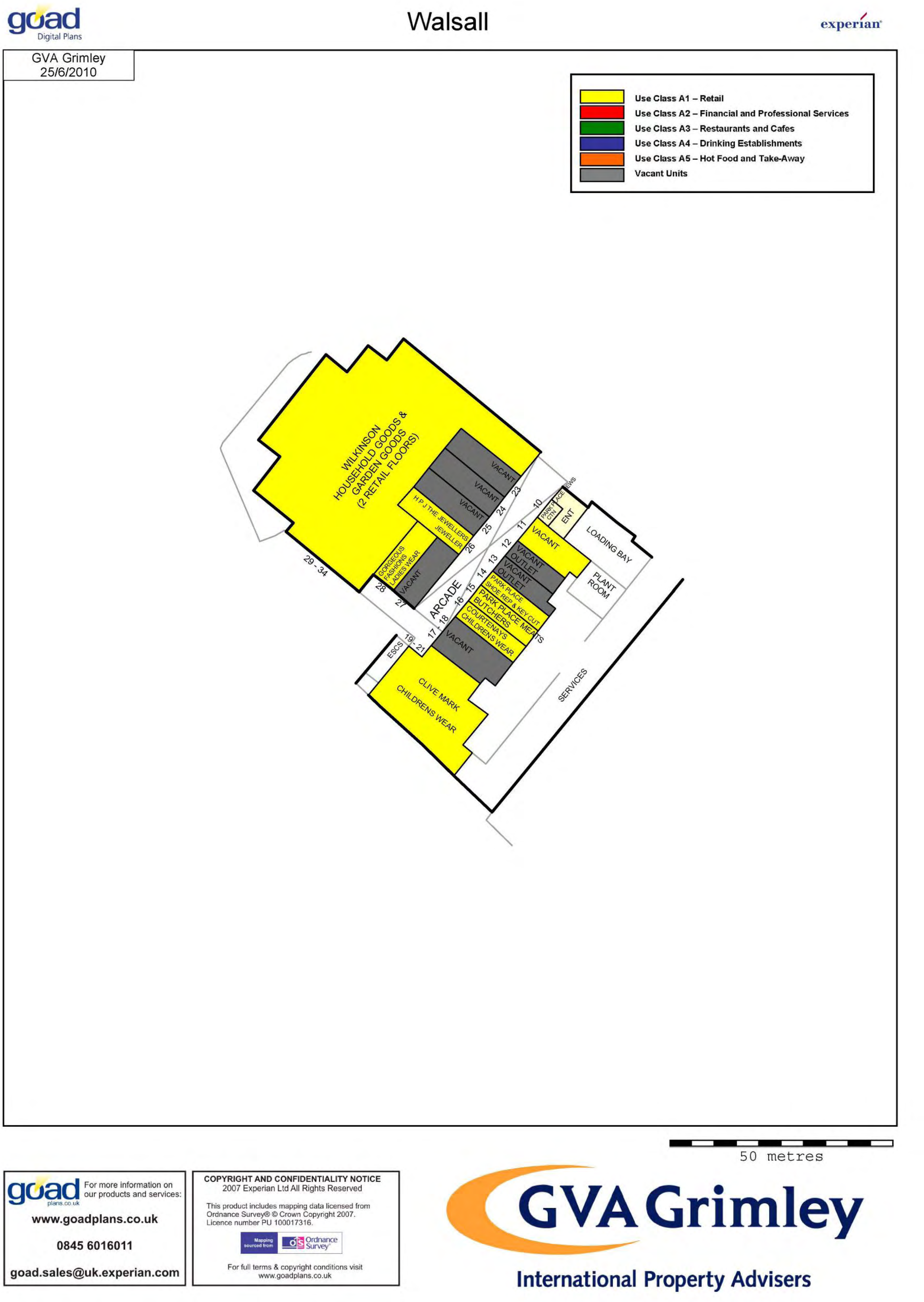
(Source: GVA Grimley via GOAD, 2010)

Figure 5.6: Plan 4 – Walsall Town Centre C



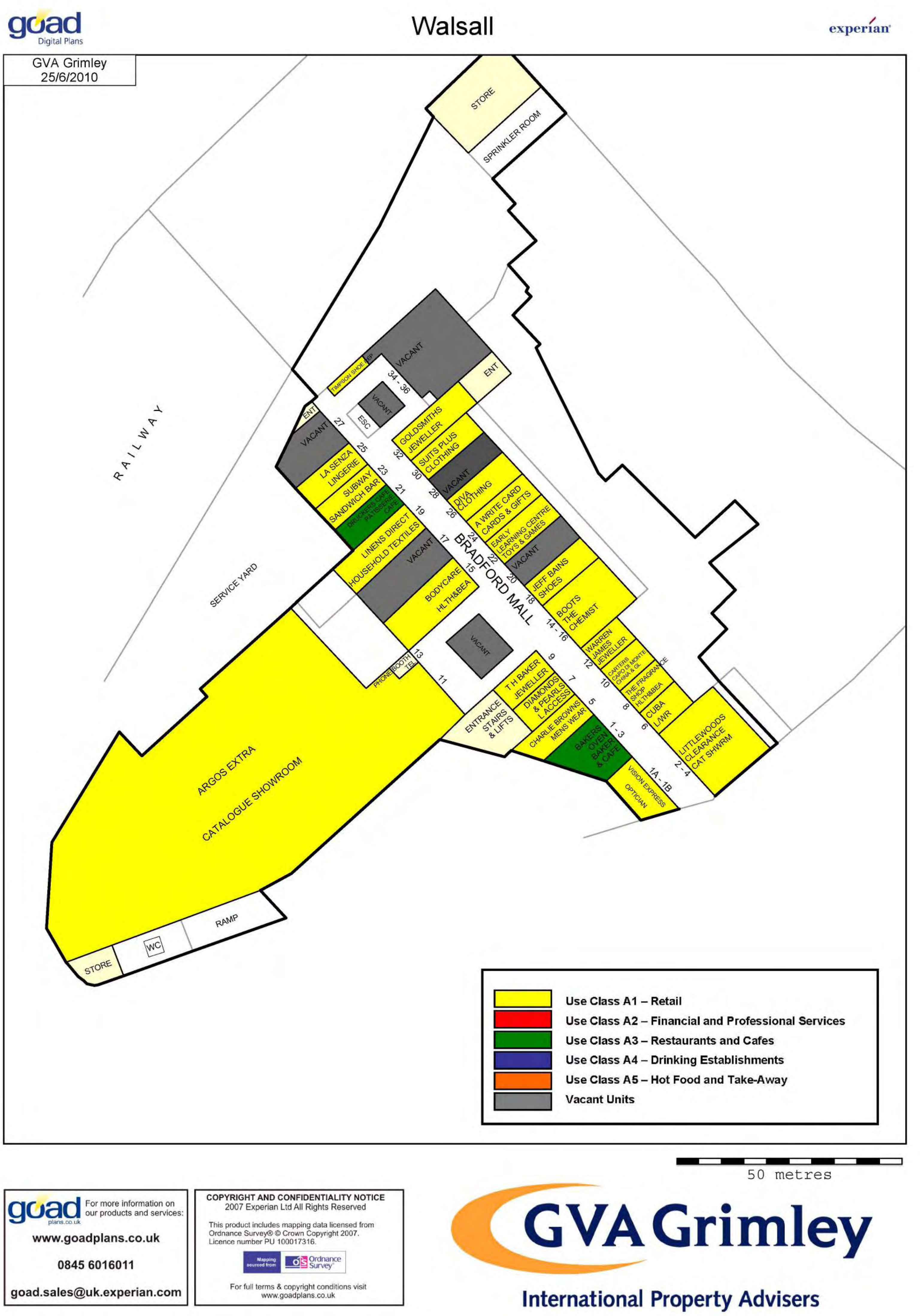
(Source: GVA Grimley via GOAD, 2010)

Figure 5.7: Plan 5 – Park Place Shopping Centre (formerly Quasar Centre) First Floor



(Source: GVA Grimley via GOAD, 2010)

Figure 5.8: Plan 6 – Saddlers Centre Lower Ground Floor



(Source: GVA Grimley via GOAD, 2010)

Performance of the Town Centre

Zone A Retail Rents

5.41 According to PROMIS (June 2010), prime rental growth in Walsall was above the average in the 1990s when it reached a peak of £135 per square foot (psf) Zone A in early 2000. Rents fell back to £125 psf during 2002 and remained at similar levels until the end of 2008 when rents started to fall due to market trends. In 2009, prime rents saw a greater than average decline compared with market trends. At the end of 2009, prime rents in the town were £95 psf (down from £115 at mid-2009), which is significantly below the PROMIS major town average of circa £123 psf.

5.42 The 'Zone A' rental level ranges for key areas within the Study boundary are as follows:

Table 5.6: Zone A Rental Levels at Key Locations (per sq ft)

Location	2009	2010
Digbeth	£25-30	£25 - £30
Bridge Street	£60 - £75	£60 - £75
Park Street	£100 – 115	£85 - £90
Saddlers Centre	£110	£90
Old Square Shopping Centre	£50	£50
Park Place Shopping Centre	£30	£30

Source: PROMIS 2009 / 2010 and GVA Grimley Analysis

5.43 **Table 5.6** above illustrates that Zone A rental values have remained relatively static in most locations around the town centre since 2009. The exceptions to this are the Saddlers Centre and Park Street which have seen a reduction of around £15-20 psf since the 2009 study. This indicates that the more attractive retailing areas of the town centre are also now experiencing a decline.

5.44 As in 2009, as a result of the current economic climate, retailers with leases which are currently on review are arguing for a "nil increase", citing the fact that shops are currently being let on "short-term" leases or licences at very advantageous lease terms, which is providing evidence of a "nil increase".

5.45 Similarly, those retailers who have leases with "break clauses" or are coming up for renewal are currently adopting the negotiating stance with their landlords that if they were to be acquiring their unit in today's climate they would be benefiting from advantageous "packages" including lower rents and rent free periods – and thereby asking their landlords to renew these leases on better (i.e. lesser) terms than they are on currently. This means that in general values are not increasing and arguably, in real terms, reducing.

5.46 It is hoped that by mid 2011 the economic climate for retailing will have started to improve, but if rent reviews are on a five-yearly cycle, it will take up to five years for the current downgrading of values in real terms to work through the system such that rent reviews will be able to utilise evidence when negotiating the scale of any uplifts.

Vacancies

5.47 As indicated in **Tables 5.3** and **5.4** and represented graphically in **Figures 5.3 - 5.8**, there are a number of vacant shops in Digbeth, The Arcade, Lower Hall Lane, Bridge Street, Bradford Street and Park Street. This equates to 13% (13,840 sq m) of the total retail floorspace within our study area boundary. This makes up a significant proportion of the town's vacancy rate (as indicated by PROMIS in their June 2009 survey) of 22.8%. This figure is significantly above the average of 12% and reflects the contraction of the centre as a result of the economic recession and the "fall out" from retailers that have gone into administration (i.e. Adams Children's Wear and Zavvi).

5.48 Vacancy rates have in recent years been high in the Old Square Shopping Centre, with the 2009 survey indicating 18 vacant units (over 40% of total space). Retailers such as Birthdays, First Choice and Going Places have all vacated space in the centre. Our June 2010 survey identified that this had decreased to 15 vacant units due to the arrival of two independent stores such as Old Square Jewellers and Golden Stitch (who have taken two adjacent units) (see **Figure 5.6**).

5.49 The Saddlers Centre has seen a marked increase in the number of vacant units. At the time of our 2009 survey, there were a total of four vacant units in the centre. This increased to 11 vacant units at the time of our June 2010 survey. Much of this increase has occurred on the lower ground floor of the shopping centre, with lower end retailers such as Priceless Shoes, Bell Zone and D2 Jeans vacating their units. This may be as a result of the relatively high Zone A rental values in the centre.

5.50 Whilst the level of vacancies remains high, there is evidence that a number of previously vacant units have been occupied on short term lets or licences, probably to avoid paying rates on vacant properties. Thus whilst it might appear that a number of previously vacant units are now trading, it is somewhat misleading as a measure of vitality and viability. The true position is therefore likely to be worse than the vacancy rates indicate.

Commercial Yields

5.51 PROMIS indicated prime retail yields of 7% in Spring 2010 (slightly above the centres average), which showed an inward yield shift on the previous six month level in line with the majority of the other PROMIS centres, and a fall from 8% in 2009.

Land Values

5.52 With the exception of the St Matthew's Quarter there is currently little undeveloped land within the prime retail core of the town centre. Land values for retail development will be a result of the type of development undertaken – for example major foodstore operators are currently paying around £1.5 million per acre for land with consent for a store of 80,000 sq ft gross with surface car parking (£2 million per acre in 2009); whereas for a smaller retail unit scheme the land value would reflect nearer £750,000 per acre (£1.5 million per acre in 2009). This shows a reduction in land values from 2009.

Town Centre Movement

Pedestrian Flow Surveys

5.53 Pedestrian flow count surveys were undertaken in Walsall Town Centre during June (13^{th}-14^{th}) 2003 and updated in September (18^{th}-19^{th}) 2009 and July (2^{nd}-3^{rd} 2010) by Pedestrian Market Research Services (PMRS). For the purpose of this report, we compare the 2009 and 2010 data sets. The analysis was undertaken at 30 locations in Walsall Town Centre (see **Figure 5.9** for 2009 and **Figure 5.10** for 2010 survey outputs).

Key Findings

5.54 We summarise below the key findings of both surveys in the locations that are particularly pertinent for the proposals being considered for the location of Walsall Market. **Tables 5.7** and **5.8** below identify footfall at key locations in relation to the current market location (and its additional proposed changes) and the previous location of the Market.

5.55 **Figures 5.11 and 5.12** provide a thermal representation of the weekly footfall in Walsall Town Centre in September 2009 and July 2010 respectively. The results show that overall, the footfall in Walsall Town Centre was at a higher level in 2009 than in 2010. Saturday was the busiest day in both 2009 and 2010.

Table 5.7: Footfall in Walsall Town Centre, 2009

Map Ref.	Location	Count (in thousands)		
		Friday	Saturday	Week
(See Figure 5.11)				
1	Asda, High Street	3,780	4,410	19,270
2	Vacant, 62 George Street	990	1,470	5,790
3	Eats and Treats Café, 43 High Street	9,450	12,420	51,460
4	Harvey and Thompson Pawnbroker, 10A Digbeth	20,340	24,720	106,030
5	Vacant, 5-6 Lower Hall Lane	6,210	8,460	34,520
6	Barclays Bank, Digbeth	21,060	25,170	108,780
7	Leather World, 18 Digbeth Arcade	1,710	2,130	9,040
8	Abbey Bank, Bradford Street	17,820	22,440	94,730
9	Cash Generator Pawnbroker, 18 Bradford Street	10,560	8,070	43,840
12	Marks and Spencer, 53 Park Street	26,070	32,640	138,140
20	Vacant, 21-23 Park Street	24,240	30,780	129,460
23	Steve's Household Goods, The Bridge	7,770	6,120	32,680
31	Vacant, 31-35 Old Square Shopping Centre	8,520	10,350	44,400
	Total:	**158,520**	**189,180**	**818,140**

(Source: PMRS data 2009 for GVA Grimley)

Table 5.8: Footfall in Walsall Town Centre, 2010

Map Ref.	Location	Count (in thousands)		
		Friday	Saturday	Week
(See Figure 5.12)				
1	Asda, High Street	3,960	3,840	18,350
2	Natko A Kubo Cafe, 62 George Street	930	1,260	5,150
3	Eats and Treats Café, 43 High Street	8,850	11,340	47,510
4	Harvey and Thompson Pawnbroker, 10A Digbeth	18,450	21,060	92,970
5	Vacant, 5-6 Lower Hall Lane	4,980	7,170	28,590
6	Barclays Bank, Digbeth	20,370	23,010	102,070
7	Leather World, 18 Digbeth Arcade	1,440	2,250	8,680
8	Abbey Bank, Bradford Street	18,030	21,330	92,610
9	Cash Generator Pawnbroker, 18 Bradford Street	8,250	7,140	36,210
12	Marks and Spencer, 53 Park Street	24,810	31,710	132,990
20	Vacant, 21-23 Park Street	22,140	28,350	118,800
23	Steve's Household Goods, The Bridge	7,320	7,800	33,880
31	Paperbox Cards, 31-35 Old Square Shopping Centre	7,590	9,360	39,880
	Total:	**147,120**	**175,620**	**757,690**

(Source: PMRS data 2010 for GVA Grimley 2010)

5.56 The footfall at both bus stations was greater on Friday than Saturday in both surveys, which may be due in part to those who use public transport during the working week, and could indicate that visitors to the town have increased access to a car at weekends rather than weekdays. The average number of people passing each count point in the centre on the Saturday in 2009 was 11,230 and 10,340 in 2010, illustrating a decrease in footfall of around 8%.

5.57 The results show that there is a clear hierarchy within Walsall Town Centre, with locations in Park Street (the prime pitch) achieving the highest footfall, and George Street / Digbeth Arcade, achieving the lowest footfall in both 2009 and 2010. In both 2009 and 2010, the upper end of Park Street (outside Marks and Spencer), was the busiest location. Moving away from the main spine of the town centre onto the side streets, there is a dramatic decrease in footfall in both surveys. The Crown Wharf Retail Park, to the west of the Primary Shopping Area, also recorded a decrease in footfall from 45,040 pedestrians counted weekly in 2009, to 42,710 in 2010.

5.58 Each location affected by the relocation of the Market has seen a reduction in footfall. It seems clear, however, that the reduction in footfall is largely consistent across the whole centre, irrespective of areas affected by the relocation of the Market. The two surveys reveal a significant reduction in visitors to the town centre in 2010. Although the two survey dates (September and July) are not directly comparable, the consultant is not aware of any major difference in circumstances (e.g. school holidays or a major event such as the football World Cup) which would explain such a decline. In view of the consistent reduction in numbers across the centre, the cause is more likely to reflect economic conditions rather than be attributable to the relocation of the Market although there is no firm evidence to substantiate this.

Figure 5.9 – Locations of 2009 Footfall Analysis (PMRS, 2009)

Figure 5.10 – Locations of 2010 Footfall Analysis (PMRS, 2010)

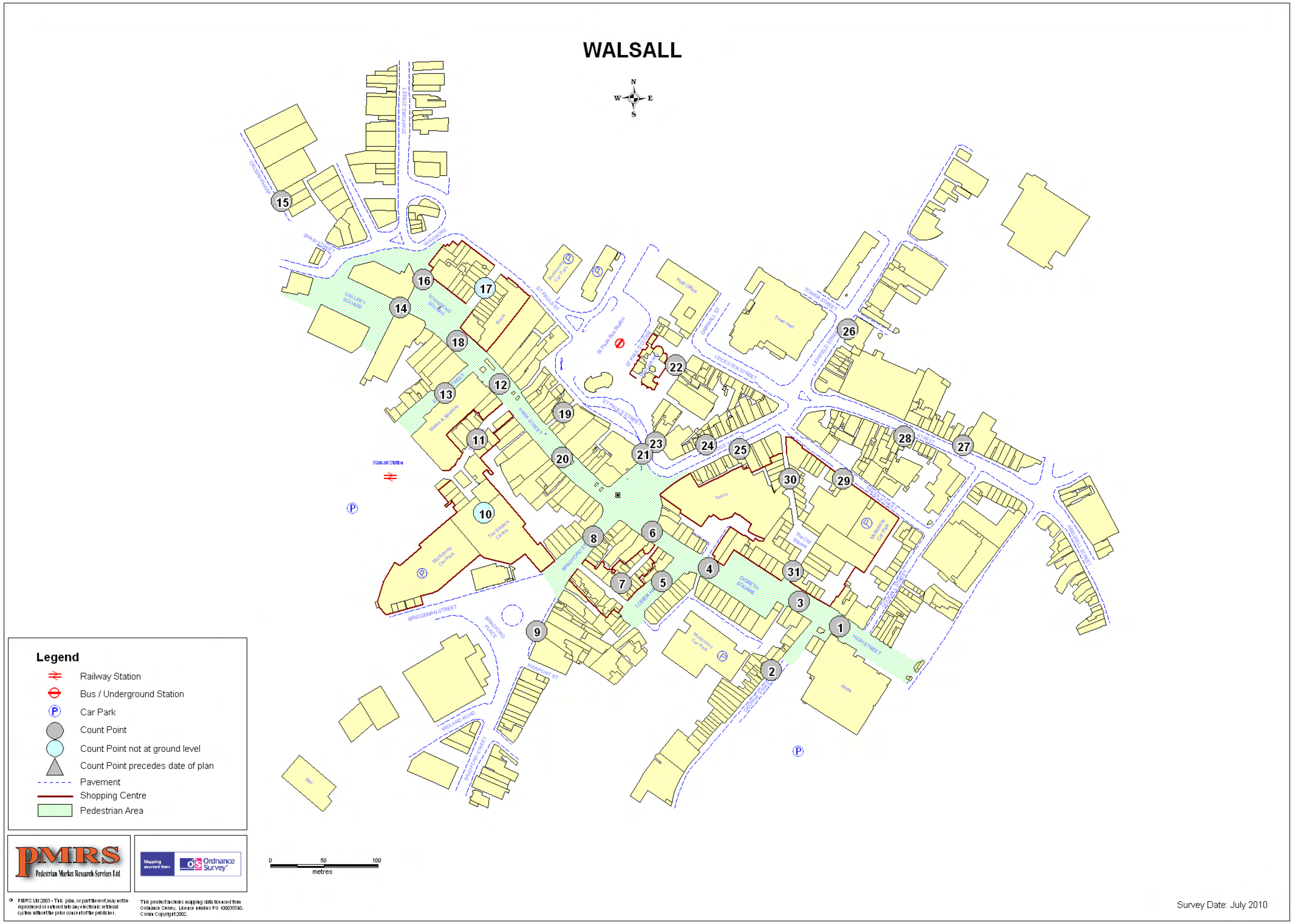


Figure 5.11 –

Figure 5.11 – Thermal Plan of 2009 Footfall Analysis (PMRS, 2009)

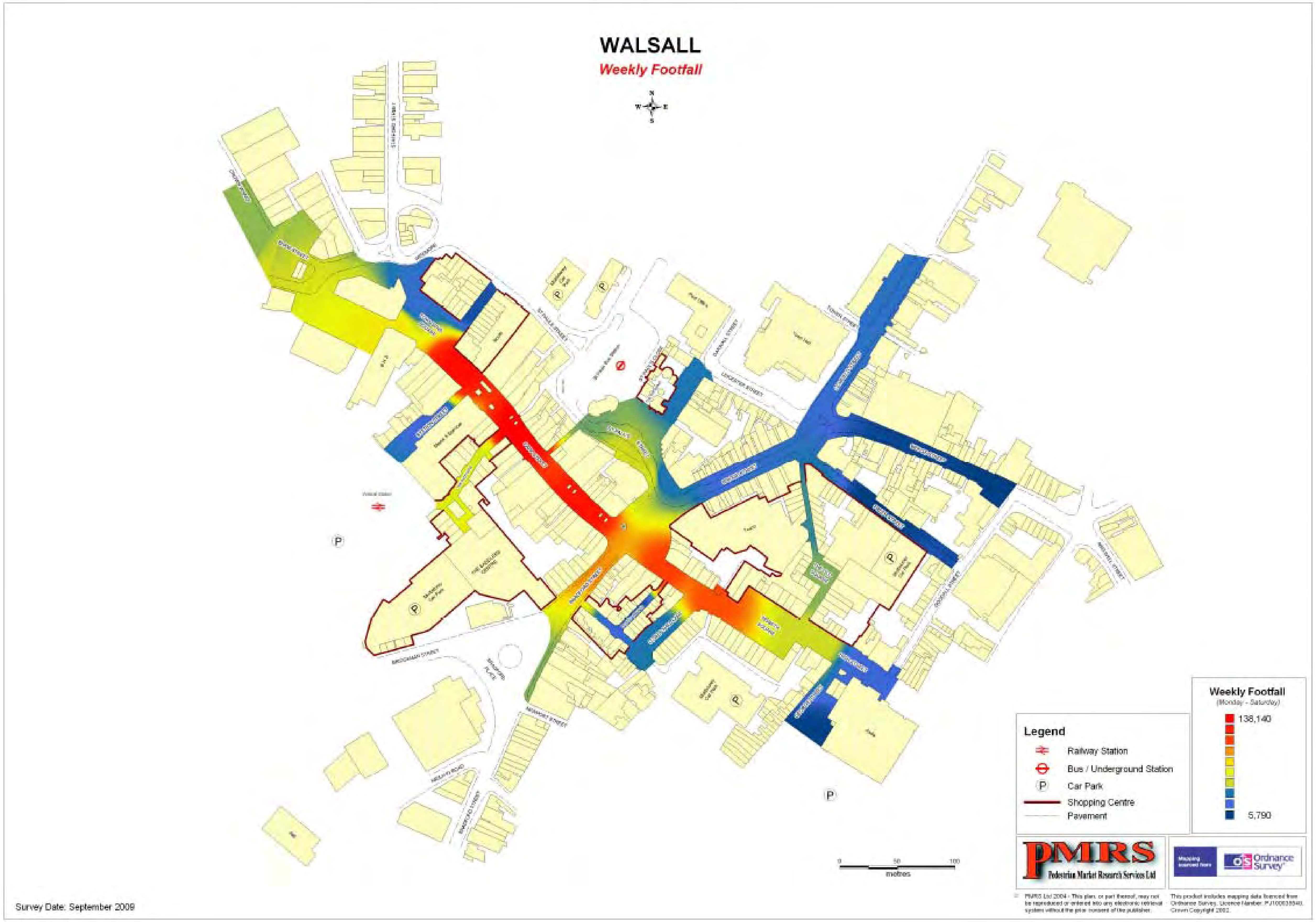
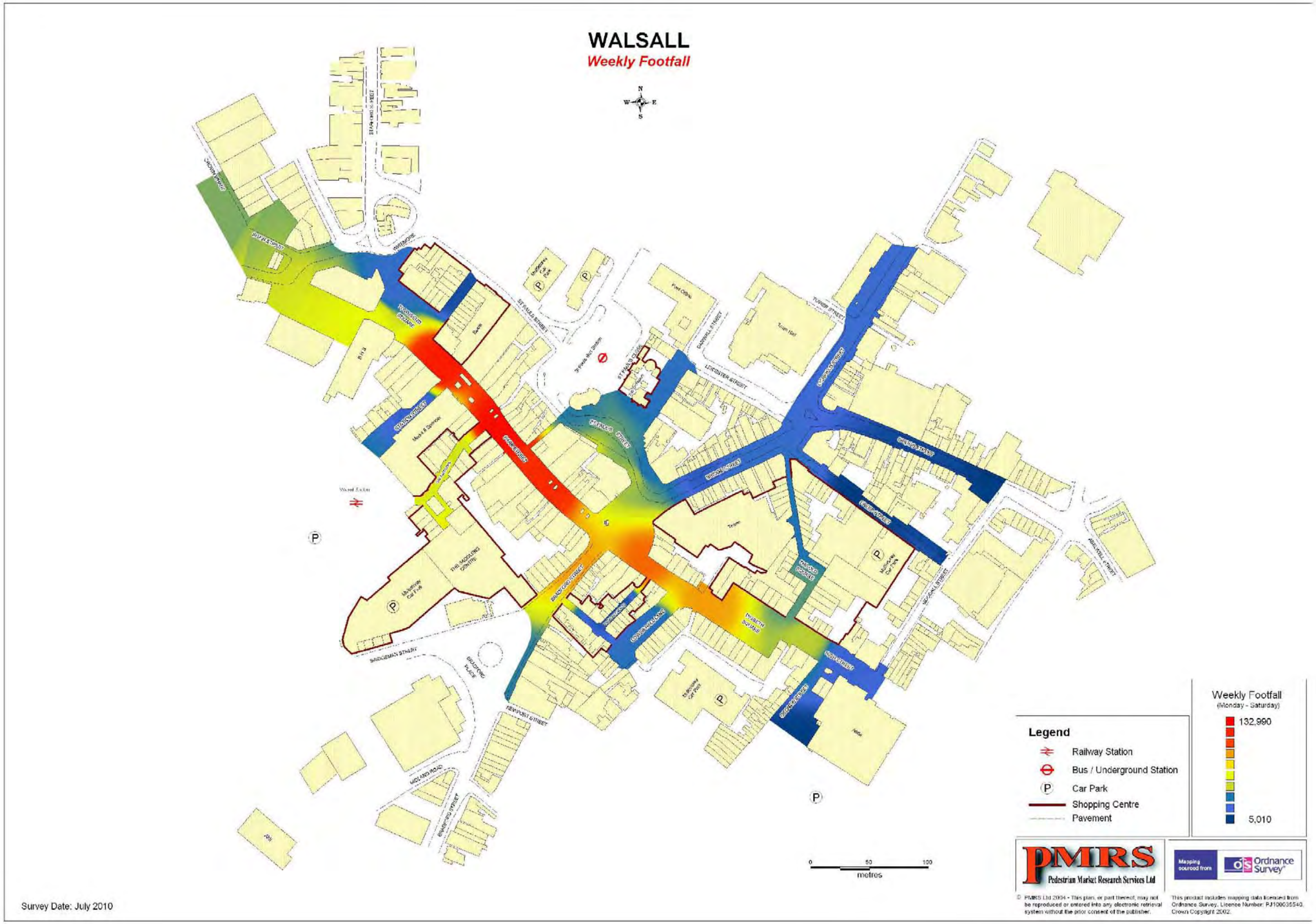


Figure 5.12 – Thermal Plan of 2010 Footfall Analysis (PMRS, 2010)



Accessibility

5.59 **Figure 5.13** summarises the accessibility of the town centre by various modes of transport by reference to the location of various public transport nodes and car parks.

5.60 With regard to car parking, the position remains largely the same as the 2009 study. There are three car parks located within the study area providing circa 1,332 parking spaces. The car park at Jerome Retail Park is partially located inside the study area and contains circa 400 spaces. In addition to this, there are two car parks on the periphery of the study boundary providing 1,390 additional parking spaces. As in 2009, most of the car parks still appear to be close to capacity, the exception being the multi-storey car park off Hatherton Road (outside of the study area) which does not appear to be as busy.

5.61 As in 2009, only two of the car parks (Crown Wharf and Asda) are considered to provide a good quality environment (modern, clean, well lit and with a safe feel). The car park off Hatherton Road is considered to provide a very poor quality environment (dark, dirty, low ceilings, enclosed and unpleasant). The remaining car parks are considered to provide a fair quality environment (fairly clean and light but could benefit from improvements).

5.62 We understand that there are proposals to redevelop the market store to the rear of Digbeth and Lower Hall Lane which would involve redeveloping the space as a surface car park, providing increased car park capacity within the study area.

5.63 There are two public transport nodes within the study area, with a series of bus stops located at the Cenotaph and a single stop outside Tesco on Bridge Street. In addition to this, Walsall Bus Station is located on the periphery of the study area on St Paul's Street, and Walsall Train Station is located to the rear of the Saddlers Centre with an access point from the centre itself.

5.64 Bus services run from Walsall to a variety of destinations including a large number of local centres in Walsall Borough, the wider Black Country and Birmingham. Key routes Monday - Saturday include (times are approximate at June 2010; source: www.carlberry.co.uk):

- Every 7 - 9 minutes – Birmingham City Centre; Wolverhampton;
- Every 15 minutes –Dudley; Stourbridge;
- Every 20 minutes – Cannock; Brownhills; and
- Every 30 minutes – Rugeley; Lichfield; Sutton Coldfield; Merry Hill Shopping Centre.

5.65 The Centro website indicates that buses to over 80 destinations pass through Walsall Bus Station each week. Services to a further 29 destinations are served from the Cenotaph Bus Station.

5.66 The transport team at Walsall MBC are not aware of any major alterations to the bus timetable / services or bus stop locations since the 2009 study that will have an affect on the Market, especially pedestrian flow along Bradford Street.

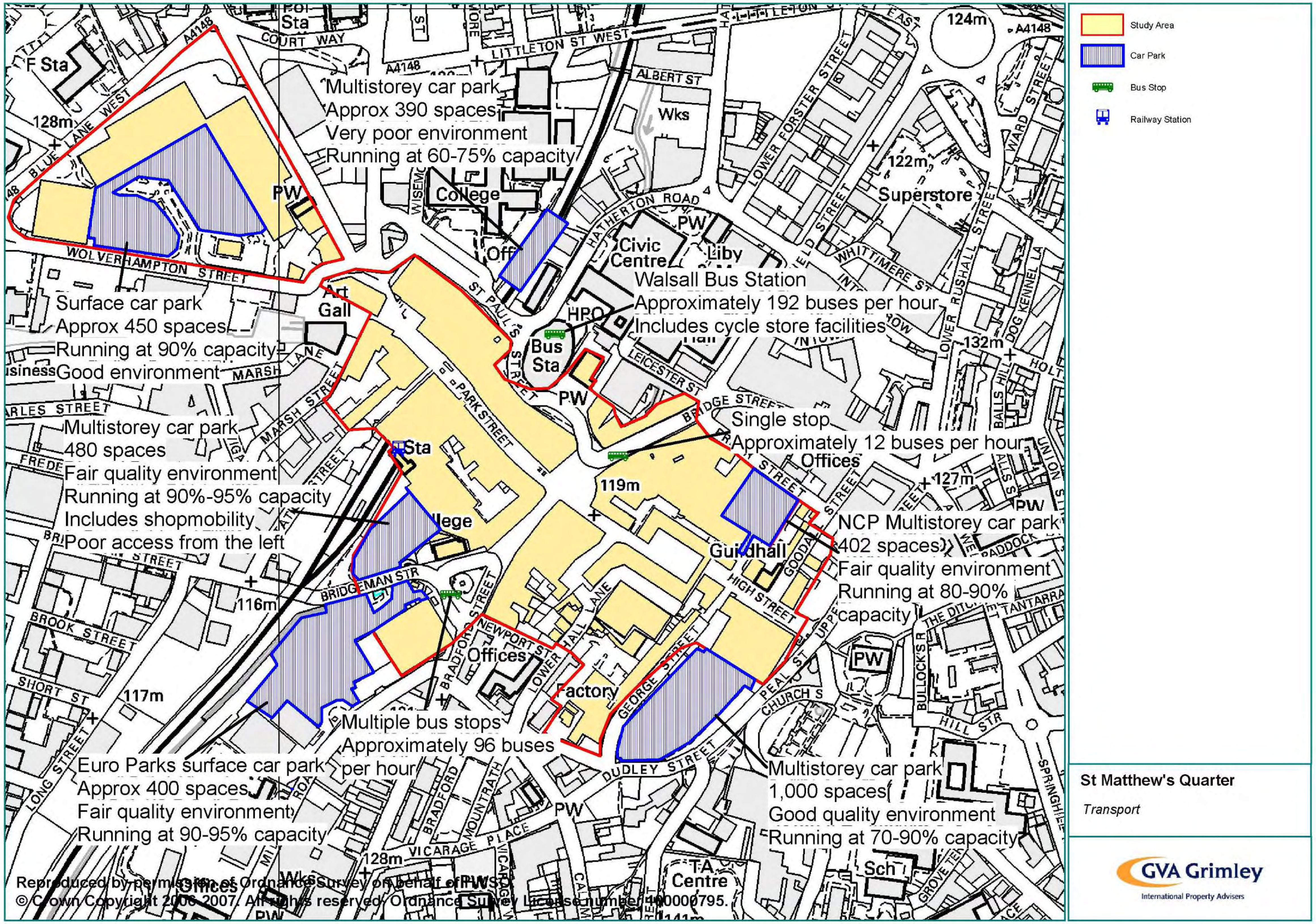
5.67 As part of the 2009 study, we were made aware from Centro that both bus stations are at capacity and will need to be expanded to cope with any increase in demand. However, information on bus patronage supplied to the consultant by Walsall MBC shows that people entering Walsall by bus during the morning peak has fallen over the last four years from 6,111 in 2005 to 5,54 in 2009 (ie by 15.7%). This compares with a fall in bus patronage in the West Midlands as a whole of approximately 3% over the last three years.

5.68 As regards train services, Walsall Railway Station offers services every half an hour to Birmingham New Street, Wolverhampton and Rugeley Trent Valley. In addition to this, we were made aware that plans are being considered to introduce a fourth platform at the rail station that will increase its capacity and increase the station’s attractiveness for intercity train operators to consider stopping their services at the town’s station. Proposals are only aspirational at this stage, and there is no timetable for development, however, they would allow more flexibility for the station to be a through route.

5.69 This information confirms that the study area continues to be well served by public transport, in particular via Walsall Bus Station as the major transport interchange to the east of the primary shopping area and the Cenotaph Bus Station alongside Walsall Rail Station to the west of the primary shopping area.

5.70 Facilities for cyclists are still provided in the form of lockers at Walsall Bus Station. Most of the car parks provide designated disabled spaces and the Saddlers Centre Car Park provides Shopmobility facilities.

Figure 5.13 – Accessibility of the Study Area



(Source: GVA Grimley, 2010)

Town Centre Perceptions

Views of the Traders and Other Parties with Interests in the Town Centre

5.71 A number of objections were received in response to the consultation process associated with the two planning applications submitted in September 2009 to relocate the markets.

5.72 One application proposed the relocation of the Market to include 16 stalls in Park Street whereas the second application proposed the relocation of the Market to include eight stalls in Park Street. Permission was granted for the second application, subject to conditions, in October 2009. The objections made to these applications indicate the views of the traders, agents and other organisations on the town centre and the Market. These are summarised below in **Table 5.9**.

Table 5.9: Objections to the September 2009 Planning Applications

Respondent	Application	Main Reasons for Objection
Walsall Market Traders Association	2	This is not the preferred option of the Walsall Market Traders Association; Eight stalls on Park Street will result in a stunted, ill thought out market plan; More stalls would have to remain in the poorly performing area of the market; An empty void will be left on Park Street which may be filled with unauthorised traders who are not under the strict management regime; Lack of flow, balanced feel and attractiveness; and Do not understand the argument to move stalls to allow a clear view of vacant units.
Agents to the BBC Pension Trust (Landlords of 1-11 Park Street and 82-87 Bradford Street)	1 / 2	The relocation will detract from the current trading ability of their retail units; The stalls will detract from the free flowing circulation of pedestrians and deter footfall; Concerns regarding waste disposal and litter; and The market stalls detract from the overall appearance of the parade and therefore affect the ability to re-let vacant units.
Toni and Guy, Bradford Street	1 / 2	Rely heavily on passing trade and concerned that the market will affect footfall past the unit. This loss of trade could have a ‘disastrous effect’ upon the already struggling business.
David Menzies Associates	1 / 2	The relocation will have a severe effect on their clients (Toni and Guy).
Agents for Threadneedle Property Investors (managers of Old Square Shopping	1 / 2	Stalls could obscure unit shop fronts; The presence of the market would make units more difficult to let; Public realm could suffer unless there is significant improvement in management; Relocation would lead reduced footfall and therefore to further shop closures in the Old Square and put pressure on anchor store

Respondent	Application	Main Reasons for Objection
Centre on behalf of owners, Zurich Assurance Ltd)		Debenhams to seek alternative locations; and Health and safety concerns.
West Midlands Police	1 / 2	No objections subject to the positioning of stalls not impeding the effectiveness of the CCTV system in the town centre.
VR Investments Ltd	1 / 2	Customer footfall will be diverted from the bus station around and past the fountain, bypassing the arcade and having an adverse impact on retailers.

(Source: Walsall MBC / GVA Grimley)

5.73 It is also noted that the following organisations / individuals had no objection to the proposals:

- Transportation Department of Walsall MBC;
- Urban Design and Built Conservation Team (Walsall MBC);
- Pollution Control (Contaminated Land) (Walsall MBC);
- Environmental Health (Walsall MBC);
- Public Rights of Way Team (Walsall MBC);
- Access and Disability (Walsall MBC);
- Advantage West Midlands;
- Fire Service;
- Natural Environment (trees);
- Centro; and
- There were no public participation (i.e. local residents) responses.

Views of Shoppers

5.74 Walsall Council undertook a survey of shoppers on Saturday 3rd July 2010 to ascertain their views on the performance of the current market and their thoughts on locations for a relocated Market. This was based upon a questionnaire that was worked up and agreed with the consultants, a copy of which is attached at **Appendix B**.

5.75 A total of 67 shoppers were surveyed, however they did not all complete the full survey. This number does not offer a representative sample of the shopping population of Walsall and only provides a flavour of shoppers' opinions. In this light, the results below should be viewed with caution.

Table 5.10: Views of Shoppers Regarding the Current Market Location / Layout

	Very Good	Good	OK	Poor	Very Poor	Don't Know
Layout	10%	38%	34%	10%	6%	2%
Access	12%	43%	35%	6%	2%	2%
Appearance	8%	45%	31%	10%	4%	2%
Cleanliness	0%	42%	29%	23%	4%	2%
Location	11%	32%	36%	8%	11%	2%

Source: Original data supplied by Walsall MBC, 2010

5.76 **Table 5.10** above illustrates that, of those shoppers surveyed, the majority think that the current location and layout of the Market is very good, good or ok (82% and 79% respectively). However, 27% of the shoppers thought that the cleanliness of the Market was either poor or very poor, indicating that this requires further improvement through the market's management regime.

5.77 **Table 5.11** below illustrates how shoppers view the current Market location compared with its previous location.

Table 5.11: Views of Shoppers when Comparing the Current Market Location with its Previous Location.

	Much Better	Better	No Change	Worse	Much Worse	Don't Know
Layout	6%	55%	9%	20%	8%	2%
Access	6%	48%	22%	16%	6%	2%
Appearance	8%	48%	18%	18%	6%	2%
Cleanliness	8%	35%	33%	16%	6%	2%
Location	14%	42%	18%	16%	8%	2%
Profile	17%	32%	25%	13%	11%	2%

Source: Original data supplied by Walsall MBC, 2010

5.78 The majority of shoppers surveyed consider the current location and layout to be either much better or better than its previous location and layout (56% and 61% respectively). In addition to the above, 48% of shoppers surveyed stated that they would prefer the Market to stay in its current location and layout, whilst 26% would like to see it move back to its old location and layout. However, as previously stated, these results only give a flavour of local shopper's views, and should not be seen as definitive.

Safety and Occurrence of Crime

5.79 The responses to the two 2009 planning applications for the proposed temporary relocation of Walsall Market did not raise any concerns with regard to the issues of crime and safety, subject to the positioning of stalls so as not to impede the effectiveness of CCTV in the area. No issues have been raised since the relocation of the Market (see Chapter 6).

Environmental Quality

5.80 The quality of the town centre environment has been appraised as shown in **Figure 5.14**. Overall the environmental quality has been improved as a consequence of improvements to the market stalls and the stricter management regime which has helped to control litter and keep stalls tidier. Nevertheless, the high vacancy rates and lack of investment in building maintenance in parts of the centre has not altered the overall assessment made in 2009.

5.81 The criteria by which the area was assessed to determine whether it is of good, fair or poor quality, were as follows:

- **Good Quality Environment –** clean, well maintained, good quality / aesthetic buildings, attracts good occupiers, low vacancy levels, good public realm, provides a good pedestrian experience;
- **Poor Quality Environment –** dirty, poorly maintained, poorly maintained buildings, attracts low end occupiers, high vacancy levels, poor public realm, provides a poor pedestrian experience; and
- **Fair Quality Environment –** an environment with components of both of the above, but with potential areas for improvement.

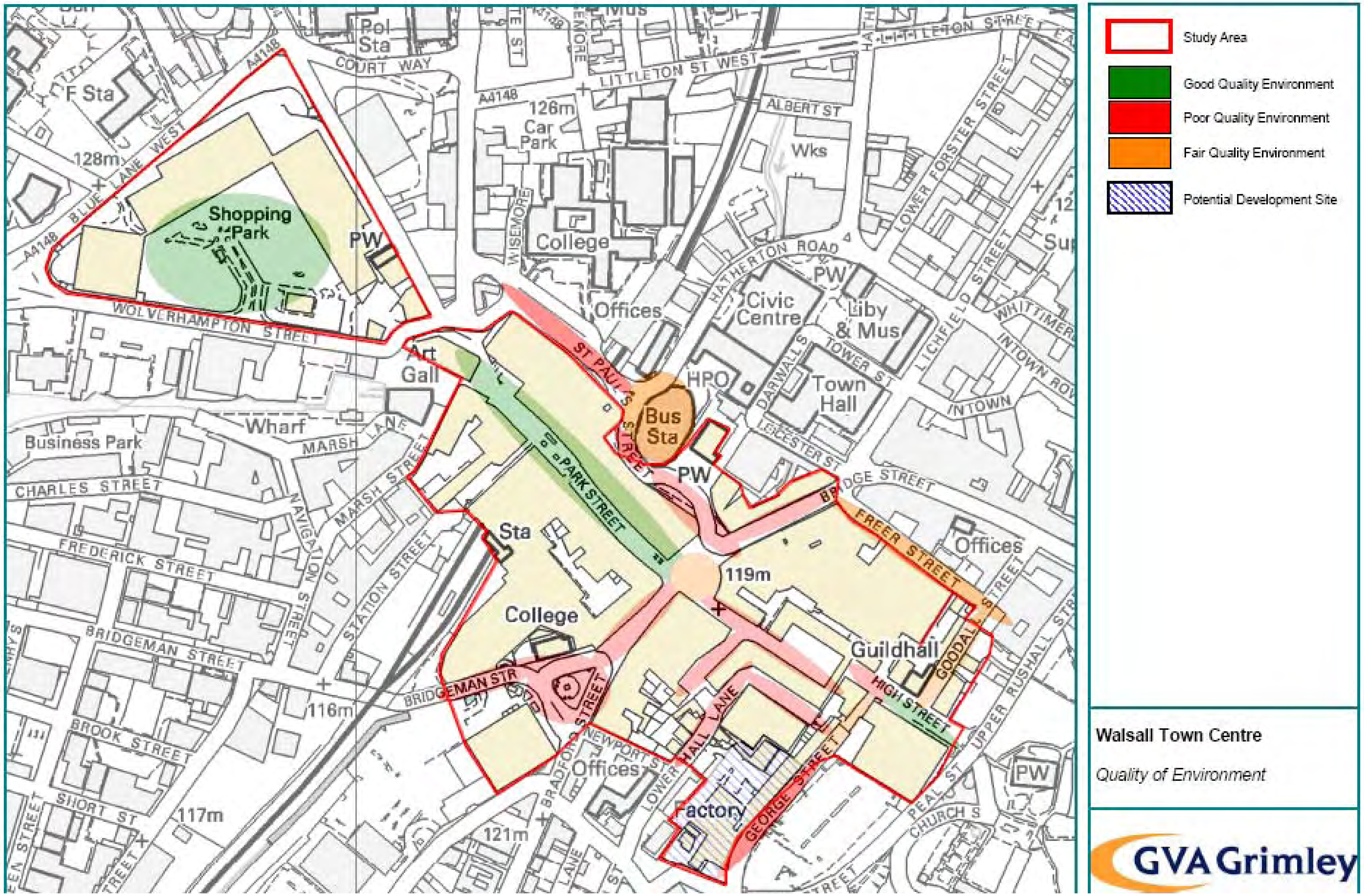
5.82 The Crown Wharf Shopping Centre, Park Street and the upper end of High Street are the only locations within the study area which are considered to provide a good quality retail environment.

5.83 The 2009 study highlighted much of the study area is considered to be of poor quality due to high vacancy rates, and poorly maintained buildings, public realm and pedestrian experience. These areas include Digbeth, Lower Hall Lane and Bradford Street.

5.84 Since the 2009 study, the lower end of High Street into Digbeth / Market Square have generally improved in appearance with a more open aspect due to the relocation of market stalls. However, these areas are still assessed as poor quality overall in view of the poor maintenance of buildings and high vacancy rates. Lower Hall Lane has some attractive buildings, but overall quality remains poor because of vacant buildings and poor pedestrian experience.

5.85 Following on from the 2009 study, there are a number of areas which are still considered to be of fair quality; these include Goodall Street and The Bridge. Paradoxically, these areas display both good and poor environmental factors. An example is Goodall Street, which contains higher quality buildings but a poor pedestrian experience, due in part, to the number of vacant units.

Figure 5.14: St. Matthew's Quarter – Environmental Quality



Source: GVA Grimley (2010)

Summary

5.86 The key findings from the PPS4 Annex D analysis are summarised in **Table 5.12** below:

Table 5.12: Summary of Key Findings from the Town Centre Health Check Assessment

Sub-heading Indicator	Summary
Retail Hierarchy and Catchment (A1-A2)	The primary catchment area total population is above the major town average. The catchment population is one of the least affluent compared to other centres and is below the major town average. The estimated shopping population of the town is above average. Town centre floorspace is above the major town average. The volume and quality of the retail provision is slightly below average compared to the size and affluence of the shopping population. The town's managed floorspace provision i.e. the Saddlers Centre, Old Square and Park Place is below the major town average. The borough has a high proportion of out of town retail, largely located along the M6 corridor between Junction 9 and 10.
Growth Prospects and Retail Demand (A3-A4)	There are limited development opportunities in the study area apart from the currently stalled St. Modwen's / Norton and Proffitt scheme and the reconfiguration plans by Threadneedle for the Old Square Shopping Centre. Overall, there is a limited, but slightly improved, demand for space in the town from retailers, which is well below the major town average.
Town Centre Performance (A5-A8)	Zone A prime pitch rentals are significantly below the major town average. Vacancies are significantly higher than other comparable centres.
Town Centre Movement (A9-A10)	The highest footfall is found in the prime pitch area of Park Street. However, footfall has significantly fallen in the town centre over the last nine months. The town is highly accessible by public transport (bus and train) and by car. However, bus patronage has fallen significantly in the morning peak which may relate to the reduction in footfall.
Town Centre Perceptions (A11-A13)	Responses to the market relocation proposals as submitted in 2009 focussed upon the impact of the market stalls on existing units and included concerns about: • Reduced visibility of shop fronts; • Reduced footfall; • Reduced trade; and • Increased vacancies.

(Source: GVA Grimley, 2010)

Conclusions

5.87 The 2009 GVA Grimley report revealed a picture of declining vitality and viability in Walsall Town Centre. This was attributed mainly to two factors:

- Competition from other regional centres such as Merry Hill and Birmingham as well as competition from out of town retail parks, in particular those at Junctions 9 – 10 of the M6; and
- The impact of the economic recession, reducing consumer demand, demonstrated via shop vacancies.

5.88 This update of the town centre's vitality and viability confirms that, whilst there are some signs of improvement reflected in slightly improved retailer demand, the overall picture remains one of further decline. This is demonstrated by the reduction in footfall, continued decline in overall comparison turnover, lack of investment in new comparison floorspace and continuing underperformance against average indices for a town of its size.

5.89 The fragility of the town centre as a whole is a key issue to which we return in our assessment in Section 8.

6. CONSULTATION FINDINGS

6.1 This section summarises the key findings from the engagement exercise that we have undertaken with the agreed key stakeholders.

Approach

6.2 The consultant has engaged with the following key stakeholders (as agreed with the client group), as follows:

- Phoenix Beard on behalf of Threadneedle for Victorian Arcade;
- London and Cambridge Properties (LCP), on behalf of the Park Place Shopping Centre;
- CBRE on behalf of BBC Pension Trust Ltd and National Australia Group;
- Invista Fund, on behalf of the Saddlers Centre;
- DTZ, on behalf of Threadneedle Properties;
- BNP Paribas on behalf of Body Shop, 12 The Bridge;
- SKY on behalf of Toni and Guy Hair Salon, 87 Bradford Street;
- Asda; and
- St. Modwen.

6.3 We approached and spoke with each of the above key stakeholders, using an agreed approach formulated around key questions raised in the consultancy brief.

6.4 We have also reviewed comments made by the following organisations to the Council: Market Traders Association, Town Centre Management Partnership (TCMP) and the Emergency Services including the Police, Fire Service and Ambulance Service.

Key Findings

6.5 The perceptions of the key stakeholders in the local business community have been considered as part of our analysis and have informed this work.

6.6 In addition to the above, the consultants made telephone contact and thereafter wrote (by email) to representatives of each of the key stakeholders. The stakeholders were asked to consider the following:

1) The existing location of the Market;

2) The relocated market position with adjustments;

3) A return to the original market location; and

4) The relocation of the market to another position in Walsall Town Centre.

6.7 Responses received by the key stakeholders are outlined in **Table 6.1** below.

Table 6.1: Summary of Consultation key Findings

Stakeholder	Response
St Modwen	**1)** The current location in unacceptable with the majority of stalls and their footfall moving away from Digbeth. Remaining stalls are located close to the frontage of their units, negating the ability to attract passing trade. Tenants also complain of noise from the meat lorry; **2)** Would like to see stalls relocated into the central square leaving space in front of units on either side of Digbeth; **3)** Only welcomed if there is a much stricter regime in relation to trading, stalls not in use and storage. Requires a strategy to improve market perception; and **4)** Could be located in an area of low footfall to 'anchor' that area. The market could be located in a new location within St Matthew's Quarter or the Old Square development, freeing up the frontages on Digbeth and Lower Hall Lane.
BNP Paribas	**1)** The client (Body Shop) does not want the market to remain in its existing location as trade is down on the year to date; **2)** – The client would like the market returned to its original position; and **3)** – If the market is not relocated to another area, the client requests the stalls are moved away from their unit.
CBRE	Strongly objects to the location of some stalls on Bradford Street and on Park Street due to the following reasons: ▪ Stalls detract from the prominence of the client's retail frontages, obscuring their view and creating a bottleneck outside of the units; ▪ Due to this congestion and access difficulties, shoppers are deterred from the Bradford Street frontages affecting the overall performance of these properties as an investment; and ▪ One tenant is selling luggage / bags and there is a stall directly in front of the unit selling similar goods.
LCP Properties	**1)** Current arrangements have not been detrimental to business; **2)** Relocated position is too widely spread; **3)** Favour a return to the original position in Digbeth; and **4)** Do not think the market should be relocated to a different part of town.
Sky	There are two vacant stalls outside of the client's unit which have had a detrimental impact on business. Sky requests that these stalls are removed or relocated.
GBR Phoenix Beard	**1)** Since the relocation of the market, the Victorian Arcade has noted a significant decrease in footfall, which has in turn made lease renewals difficult. **2)** The current location of the stalls makes the town look cluttered and from a retail perspective, does not present an attractive central point with sight lines affected from all angles. **3)** The plan submitted does little to alter the overall layout of the market and would have no positive effect on the issues highlighted. Object to the proposed layout.

Stakeholder	Response
	4) Preferred option would be to see the market predominantly restored to its original position, but with stalls located in single file along the middle of Digbeth, so not immediately adjacent to the shop frontages.
TCMP – Saddlers Centre	▪ The market obscures the approach to the Bradford Street entrance to the centre. Littlewoods is the only tenant directly affected but they do not have an issue with the location of the market; ▪ The market will blight trading pitches of high street retailers if there is a movement to keep it in the town as a permanent fixture. Understand that a number of retailers are considering their future in the town; ▪ Walsall needs to focus on keeping 'new generation' customers rather than allowing them to defect to centres such as Birmingham if the high street can not offer them the choice they want; and ▪ The market does attract additional footfall but should be viewed as an add-on to existing offer but not detrimental to the high street retail offer.
CBRE – Old Square Shopping Centre	▪ Moving the market away from its previous location has detracted from customers visiting the shopping centre and thus independent traders have struggled to survive; ▪ The meat wagon blocks the entrance of one of the retailers causing trade to fall; ▪ Stalls look an eyesore on market days; and ▪ It is important that retail interest is preserved to prevent the loss of High Street names so that the town can compete with the likes of Birmingham and Wolverhampton.
WM Fire Service	The West Midlands Fire Service has confirmed that it does not foresee any problems from a fire service perspective.
WM Police	No concerns or objections regarding the relocation of the market, so long as the positions of the stalls do not reduce the efficiency of the town centre CCTV system.
West Midlands Ambulance Service	▪ Support current market location as it improves access to the NHS walk-in centre located in Old Market Square. ▪ Would be concerned about extending stalls beyond the overstrand as they gain access into the town from George Street.

(Source GVA Grimley, 2010)

Conclusions

6.8 The responses from retailers, investors and development interests in the town centre show a clear desire for the Market to be returned to its original position, although for different reasons. These views differ radically from those of the market traders whose opinions have been expressed via discussions with Walsall Council.

7. THE SCENARIOS AND APPROACH TO THEIR ASSESSMENT

7.1 As identified in the Introduction, the purpose of this update of the 2009 evidence base is to determine the impact of the relocation of Walsall Market and to advise upon its future location within the town centre.

7.2 In their brief, the Council has requested advice on the impact of different locations on the future of the Market. We have assessed these as four scenarios, as follows:

i) **Scenario 1: The market remains in its relocated position** as shown in **Figure 1.1**. The stalls are laid out in a north / south, east / west cross principally in Digbeth, The Bridge, Bradford Street and the southern end of Park Street.

ii) **Scenario 2: The market remains in its relocated position with some adjustments** (see **Figure 1.2**).This amended layout proposes to relocate the 11 market stalls (no. 69 – 79 coloured blue on **Figure 1.2**) currently located outside the retail units on the south side of Digbeth to a position further away from the shop fronts (but still within Digbeth) which are annotated green on the plan. It also seeks to relocate nine stalls (nos. 80 – 88, also coloured blue), to create a parallel run of stalls extending further into the market square. The meat wagon would be located at the eastern end of the run facing down Digbeth. The amended layout also proposes to relocate two kiosks (nos. 29 & 30) from Bradford Street, a kiosk from Digbeth (no. 58), and two kiosks (Nos. 37 & 38), from the Bridge into the reconfigured area in Digbeth.

In discussion with Council Officers, the consultant has also given consideration to possible variations on the Council's proposals which are discussed in Section 8.

iii) **Scenario 3: The market returns to its original location at Digbeth** (**Figure 1.3**). This scenario would see the market return to its previous location (prior to November 2009) which was primarily around the Digbeth area of the town centre, with the majority of stalls positioned around the outside and in the middle of the open market square. The stalls would extend no further than the bridge that links Old Square shopping centre with Digbeth House and the property owned by Norton & Proffitt / St. Modwen. The market would then stretch in a linear fashion from Digbeth with stalls on both sides, and would end before The Bridge opens out in the centre of the town. Additional stalls would also be located along one side of Lower Hall Lane.

iv) **Scenario 4: The market relocates to another position.** Opportunities to relocate the Market within the town centre are limited, but under this scenario the consultant has assessed the following possible locations:

- A new indoor location within either the Norton & Proffitt / St. Modwen scheme or the proposed Threadneedle redevelopment scheme;
- Relocation to Upper High Street and the Digbeth area, reflecting the historic location of the market;
- Relocate to the vacant site previously occupied by Shannons Mill.

7.3 Under this scenario, we have also considered the possibility of the Market remaining in The Bridge / Digbeth areas within a revised configuration and layout.

7.4 For each scenario we assess the following:

- Impact on the market itself;
- Impact on the vitality of the town centre as a whole;
- Impact on various constituent parts of the town centre; and
- Possible time periods for a new planning permission.

7.5 The means of assessment is similar to the criteria based approach adopted in 2009, using town health check indicators supplemented by consultations with key parties.

7.6 The assessment criteria include:

- Compliance with the Development Plan;
- Impact on the town centre conservation area;
- Impact on town centre vitality and viability;
- Accessibility;
- Town centre safety and security;
- Town centre management; and
- Consultations responses.

7.7 Our assessment is indicated as strong positive (++), positive (+), neutral (0), negative (-) or strongly negative (--).

7.8 It was evident from our 2009 report that the difference between alternative market locations is relatively minor in relation to many of the criteria. This is even more so now that the Market's management regime and market improvements have been implemented which is common to all the scenarios. This means that any differences identified are largely matters of degree rather than substantive. It also means that the assessment is inevitably based on our professional judgement taking account of some of these relatively minor variations. Undoubtedly, the most significant and influential criteria is the response of the market traders and other parties with an interest in the town centre, particularly where the views expressed might be seen as indicating potential negative influences upon the town centres wider retail offer.

7.9 It must also be recognised that a number of variables have changed since our 2009 work. In addition to the Market's relocation, it has also been improved and other factors such as the closure of Brownhills Market and the general economic climate are also likely to have influenced the performance of the Market. This makes it difficult to isolate cause and effect and makes a true comparison with its performance in 2009 difficult to achieve.

7.10 With these points in mind, we turn to the assessment of the scenarios.

8. ASSESSMENT OF SCENARIOS

Scenario 1: Market remains in Current Location

Market Performance

8.1 Our analysis of Walsall Market's performance in Section 4 indicates that despite an anticipated reduction in overall turnover this year, it has fared reasonably well since its relocation. In Section 4, we attribute this to a number of factors of which the following are key:-

i) Relocation to a part of the town where footfall is higher;

ii) Improvements to the appearance of the Market coupled with improved management practices;

iii) A continuing uncertain economic outlook leading to a stronger demand for "value" goods; and

iv) An increase in the number of stalls and permanent stall-holders.

8.2 Increased rental income from the market, and traders support for the current location, are also indicative of a better market performance in this location. Despite this, we understand that market traders still have a preference for more stalls in Park Street. This was not supported in our report in 2009 because of its potential impact on the prime shopping frontages and planning permission was not granted for this option. It has not, therefore, been considered further in this report.

Impact on Vitality and Viability on the Town Centre as a Whole

8.3 As demonstrated in Section 5, the vitality and viability of Walsall Town Centre as a comparison goods destination is continuing to decline. Of particular concern is the fall in comparison retail turnover (down from circa 349 million in 2004 to circa 293 million in 2009) coupled with an overall reduction in footfall in the town centre. In this situation, the enlarged and more attractive market is important in bringing vitality and footfall into the centre in the face of longer term decline, provided that this positive benefit is not outweighed by other, less positive, considerations.

8.4 In this connection, from a retailer and investor perspective, the relocation of the Market has brought a generally negative response. Even occupiers and investors in Park Street, such as the Saddlers Centre and Park Place, which are less directly affected by the siting of Market stalls in Park Street, have requested that the Market should return to its original position. Those investors and occupiers that are more directly affected by the relocated stalls, such as the premises at the corner of Park Street and along Bradford Street, the Saddlers Centre (in respect of their Bradford Street entrance), together with some individual traders, are clearly unhappy about the Market in its new position because it has obscured their shop frontages and impacted on their businesses. A number of consultees have provided information on the extent of impact on their turnover. Conversely, the owners of the Victorian Arcade report that they have suffered significantly from the removal of stalls in Lower Hall Lane leading to a significant reduction in footfall through the Arcade whilst their entrance in Digbeth has suffered from congestion and reduced visibility. Threadneedle also comment on the impact of a reduction in footfall caused by relocation of the Market on their occupiers in Old Square which is corroborated by the Old Square centre manager.

8.5 The relocated Market appears to have been better received by shoppers, although caution should be exercised as the numbers interviewed were too small to be statistically representative.

8.6 The mixed response is perhaps not surprising. It indicates that the strategy of protecting the prime shopping pitch in Park Street was appropriate as it continues to be the area with the highest footfall and highest quality retail offer. Those directly affected in Digbeth and Bradford Street are generally opposed to the relocation of the Market because it has adversely affected their trader either by obscuring existing frontages or by taking footfall away from their locations. In our judgement, however, the continuing decline in the fortunes of the town centre as a whole is part of a pattern of longer term decline more related to out of centre competition and the economic climate rather than to the relocation of the Market per se.

8.7 The major issue for Walsall Council, given the continuing decline in the attractiveness of the town centre, is how to win shoppers back to the benefit of all traders. The Market, whilst playing an important role, particularly in the economic downturn, still constitutes only about 2% of total comparison spend in the town centre. The priority, therefore, should be to secure investment in the redevelopment and refurbishment schemes currently being discussed in the St Matthew’s Quarter. It is our opinion that securing new and improved comparison floor space at this end of the primary shopping area is essential to improving the town centre’s offer, drawing trade back to the centre and increasing its turnover. It follows that, in giving detailed consideration to alternative locations for the Market, these should not prejudice or threaten future investment in this major town centre schemes. In other words, there is a danger of the “market tail wagging the town centre dog” and it is important for the focus to remain on the health and future of the town centre as a whole in making any investment decisions on the Market.

Planning Permission

8.8 The extant planning permission expires on the 28 October 2010. Consideration has been given to whether a permanent consent for Walsall Market in its current location could be granted. This would be possible although we have reservations in view of the extent of objections received from retailers and investors and the progress on major development schemes which are likely to have an important bearing on the future location of the Market (see Scenario 4 below). For these reasons, if a further consent were to be granted for the Market in its current location, we consider a further temporary consent would be appropriate. We return to this point in our overall assessment of findings and conclusions.

Assessment of Scenario 1 against Selected Criteria

Criteria	Comment	Assessment
Compliance with Development Plan	Although not in the location envisaged by planning policy, its position is not inconsistent with policy and is considered acceptable.	Positive (+)
Impact on conservation areas.	Removal of the stalls from Lower Halls Lane has improved visibility of the conservation area buildings. Conversely, putting more stalls in the vicinity of Bridge Street / Bradford Street has potentially added "clutter" to the Bridge Street Conservation Area.	Neutral (0)
Impact on town centre vitality & viability.	In the current difficult economic climate where the town centre is continuing to struggle, the improved vitality of the Market is a positive, as we have no evidence of a direct link between the relocated Market's performance and the decline of the town centre.	Positive (+)
Accessibility	Accessibility to the town centre is good. Digbeth is also good although congested at times.	Positive (+)
Safety and security	No issues have been raised and is assessed as neutral given that this similar for all scenarios.	Neutral (0)
Town Centre Management	This has improved but is common to all the scenarios it is therefore assessed as neutral.	Neutral (0)
Consultation responses	Mixed response, appears to be popular with shoppers and traders and preferred by the Ambulance Service but the relocated position is not supported by many town centre traders / investors.	Mixed

Scenario 2 - Market remains in its relocated position with minor adjustments

8.9 The Council has proposed the relocation of five kiosks for operational reasons, together with 20 stalls in Digbeth in order to create a new parallel row of stalls further away from retail frontages in Digbeth and Market Square.

Impact on the Market

8.10 The proposed changes are marginal, and, in our opinion, are unlikely to have a material adverse impact on the vitality and viability of the Market itself.

8.11 We understand that the market traders would accept this alternative layout, although they would prefer the current position as it provides better visibility of both rows of stalls on the approach from Digbeth.

Impact on the Town Centre

8.12 The proposed adjustment is too minor to have any significant impact on the town centre as a whole. As regards constituent parts of the town centre, we consider the amendment would not have any significant implications for Park St, The Bridge, or the Lower Hall Lane areas of the town centre compared to the current location. The impact on Market Square would not be significant, although consideration should be given to ensuring that the pedestrian route through from Upper High Street into Digbeth would not be impeded by the location of the eastern-most stalls and the meat wagon.

8.13 The amended layout would respond positively to concerns raised by occupiers in St Matthew's Quarter to the location of stalls further away from their shop retail frontages in Digbeth. Whilst this is a positive response by the Council to comments received, we are concerned that this could set a precedent which may result in other discontented retailers and/or developers approaching the Council to remove market stalls from their retail frontages. In line with our views about the Council focussing on securing investment in the retail area, we consider that if the Council meets the requirements of one potential investor or retailer, it should be willing to do the same for others in a similar position. This could lead to further relocation requests with attendant additional costs and disturbance for traders.

Planning Timescales

8.14 This proposed solution would conflict with the emerging Threadneedle proposals for the redevelopment of Old Square. We understand that these are likely to be implemented on a phased basis, and that work to the Old Square Shopping Centre affecting the market square would be a second phase. The timescale for the second stage of works may therefore be two-three years away. Scenario 2 could, therefore, offer a temporary solution, but does not offer a permanent solution to the Market's relocation.

Further Amendments

8.15 The consultants have considered whether further alternatives to the Council's proposed revisions should be adopted.

8.16 Firstly, it is considered that the location of the stalls at the eastern end of Digbeth and the meat wagon should be adjusted to encourage an unimpeded pedestrian flow between Upper High Street and Digbeth.

8.17 Secondly, in order to facilitate development on both sides of Digbeth, the Council could consider revisions to identify a 'reserve area' capable of accommodating further market stalls in Lower Hall Lane. This reserve area could serve to facilitate Phase 1 of the Threadneedle Scheme, for example, if necessary, by relocating stalls from a proposed new prime frontage. This reserve area could be considered either in conjunction with the Council's proposed amendments in Scenario 2 or as an amendment to Scenario 1.

8.18 The proposed amendments could help secure important future investment in this part of the town centre. It is recognised, however, that they may not be supported by market traders, unless the existing market store is demolished and replaced with a surface level car park, as part of the St Modwen refurbishment scheme, which would create a stronger pedestrian route through Lower Hall Lane. This proposal may also not be supported by St Modwen as it would potentially introduce more stalls in front of their premises in Lower Hall Lane.

8.19 As neither the St Modwen nor the Threadneedle schemes have planning permission yet, the Council could defer a decision on these amendments pending progress on the redevelopment schemes. That would leave the Market in its current location where it is adding vitality and value at a time of increased demand for value goods pending redevelopment works. It would also avoid the precedent issue. Alternatively, if the Council wishes to address some of the concerns raised, a temporary approval could be granted for Scenario 2, with the further revisions as described, although there would be cost implications to be borne by the Council. We return to the appropriate timescales later in this section.

Assessment of Scenario 2 against Criteria

Criteria	Assessment	Score
Compliance with Development Plan	Consistent with policy; similar to Scenario 1 – overall neutral affect.	Postive (+)
Impact on conservation areas.	No significant impact arising from Council amendments. Potential slight adverse impact through relocating stalls into Lower Hall Lane as proposed by further amendments.	Neutral (0)
Impact on town centre vitality & viability.	Little impact on market and improves relationship of stalls to some shop frontages.	Positive. (+)
Accessibility	Good access to town centre; amendments may ease congestion in Digbeth if further amendments are implemented.	Positive (+)
Safety & Security	Good, same as Scenario 1.	Neutral (0)
Town Centre Management	Improvements common to all scenarios.	Neutral (0)
Consultation Responses	Addresses some concerns of potential investors but not of most consultees. (But views on proposed reserve pitches not yet obtained).	Mixed Not known

Scenario 3 – Market Returns to Original Position (Pre-November 2009)

8.20 This scenario considers the Market in its position in the Market Square, with some stalls extending into Digbeth and Lower Hall Lane.

Market Performance

8.21 The Market was declining in its original position. As stated earlier, it is not possible to assess whether its' performance would have improved in its original position as a consequence of the improved appearance of the stalls and management regime. However, the significant reduction in footfall throughout the town centre, including the lower flows in Market Square, described in Section 5, suggest that without its relocation to areas with higher footfall, its decline would have continued.

8.22 The Market Traders would not support a move back to its original position.

Impact on the Town Centre

8.23 In view of the relatively small contribution that the Market makes to the overall town centre turnover, it is unlikely that moving back to its original position would have a significant adverse impact on the turnover of the town centre as a whole. Nevertheless, moving the Market back to its original position without any redevelopment works in St Matthew's Quarter to stimulate more confidence in the town centre would risk a further deterioration in the vitality and viability of the centre.

8.24 It is noted that the majority of retail occupiers and investors who responded to the consultant supported a return of the Market to its original position, although with some comments regarding the need to move the stalls away from shop frontages in some parts of Digbeth.

8.25 As regards the component parts of the centre, Park St and Crown Wharf would not be materially impacted. Some respondents felt that Bradford Street would benefit from a less congested appearance. Mixed views have been expressed as to whether The Bridge / Bradford Street / Digbeth areas would benefit from less clutter and footfall, or would suffer from the loss of vitality associated with the market stalls.

8.26 Lower Hall Lane and the Victorian Arcade would benefit from the additional footfall arising from the reintroduction of market stalls into Lower Hall Lane, and Market Square would also gain from the additional footfall associated with the market, although it would, inevitably, be more congested.

8.27 Overall, there is support for this proposal from investors and retailers, but considerable opposition from the market traders. This scenario would also involve additional costs in relocating the Market.

Planning Permission

8.28 This scenario does not provide a long term solution to the location of the Market, as it is incompatible with proposals being brought forward for the redevelopment of Old Square and Market Square. A permanent consent could be granted, but does not seem appropriate given the need to encourage investment in the redevelopment schemes in this area, and potential issues arising in relation to the location of stalls immediately outside new or refurbished retail units.

8.29 If this scenario is adopted, we recommend a maximum of 12 months, within which we would expect the redevelopment proposals to come forward, and for plans to be properly considered for a permanent market location. Notwithstanding this, we have reservations over the merits of moving the Market again in the face of opposition from market traders who will suffer from the reduced footfall in advance of delivering significant improvements through the redevelopment schemes in the St Matthew's Quarter.

Assessment of Scenario 3 against Criteria

Criteria	Assessment	Score
Compliance with Development Plan	Wholly compliant with planning policy.	Positive (++)
Impact on conservation areas	No significant impact on Church Hill Conservation Area; potentially slight improvement to the Bridge St Conservation Area arising from the removal of stalls from within this area.	Slight positive (+)
Accessibility	Good to town centre as a whole. Accessibility within the St Matthew's Quarter may be slightly impacted by the location of market stalls within the Market Square.	Postive (+) And slight negative (–)
Safety and security	No different to other scenarios.	Neutral (0)
Town centre management	No different to other scenarios.	Neutral (0)
Consultation responses	This scenario is broadly favoured by town centre retailers and investors, but opposed by traders. The ambulance service does not favour this scenario.	Mixed

Scenario 4: Alternative Locations for the Market

8.30 The locations assessed for the Market in Scenarios 1, 2 and 3 are all short term. In the medium to longer term, a new location and/or layout for the Market will be required, assuming the St Modwen and Threadneedle schemes are implemented. In particular, redevelopment proposals for the Old Square Shopping Centre would involve loss of the Market Square, leaving Digbeth as an elongated street. Only Scenario 1, leaving the Market in its current position could be physically accommodated in Digbeth alongside the proposed redevelopment proposals. Even in this situation, the relationship between the improved shop frontages along Digbeth and the market stalls would, in our view, be unsatisfactory. The close proximity of markets stalls outside new prime frontages, and congestion arising from increased footfall are likely to be issues with occupiers. If the town centre as a whole is to be uplifted, such frontages should be protected in similar fashion to those in Park Street, to allow Digbeth to become at best, a prime retail pitch or, at worst, a good secondary retail location, extending the offer and attraction of shopping, and counterbalancing the Crown Wharf / Park Street end of the Primary Shopping Area. As a consequence, we recommend that longer term and permanent alternative locations for the Market are assessed. At this stage, in advance of completion of improvements of Digbeth / Market Square, we have identified four possibilities, as described in Section 7. We have assessed these only at high level, to establish whether they are worthy of taking forward to more detailed consideration over the next 12-18 months.

No consultation has been undertaken on these, although some responses from retailers have offered general comments on alternative locations. These are referenced in relation to the relevant options assessed below.

8.31 Our initial assessment of alternative locations is as follows:

i) Market relocates to new indoor location.

The only known possibilities at this stage are the St Modwen and Threadneedle redevelopment schemes in the St Matthew's Quarter. We are aware that St Modwen are not currently progressing their original proposals for a purpose-built indoor market. There could be potential for a new indoor market hall within the Threadneedle scheme, but we are not party to discussions between the landowner and Walsall Council on whether this is feasible.

Walsall Market has historically been an outdoor market, so the acceptability of an indoor solution is yet to be tested. Nevertheless, a well designed, purpose built market hall could offer a permanent solution.

ii) Market to relocate to Upper High St / Digbeth Area

This alternative would only be feasible after the Threadneedle proposals are underway, and the unsightly bridge link in Digbeth has been removed, restoring the visual and physical links between St Matthew's Church, High Street and the Primary Shopping Area.

This relocation option would involve the Market moving to Upper High St which, we understand, was historically its original home. This area has attractive buildings and views, and benefits from a wide, main pedestrianised street, which would sit close to Asda and the redeveloped Digbeth area where footfall should significantly increase following redevelopment.

It is unlikely that all market stalls could be relocated in Upper High St, but the potential exists to reconfigure existing stalls in Digbeth to a more central position, which would create a linear market approach towards Upper High St. This is considered further below.

The benefits of such a location and layout would be to reduce congestion in Digbeth, and ensure that new/improved shop frontages have good visibility. Equally, the market stalls could partly remain in Digbeth, and still be close to the newly revitalised areas within the St Matthew's Quarter.

The views of market traders and retailers would have to be taken into consideration, but this alternative is worthy of more detailed assessment as a longer term permanent solution.

iii) Market to relocate to the Shannons Mill area

This alternative is considered as it is the largest vacant town centre site. Its location is, however, peripheral to the main areas of retail activity and is not considered feasible unless either an indoor or outdoor market is accommodated within a wider redevelopment scheme, incorporating units 57 – 58 Lower Hall Lane, the current market store and the proposed interim car park area. We are not aware of any proposals for this wider area at present.

8.32 As part of our high level assessment of alternative locations, we have also given consideration to the principle of reducing the size of the Market, linked to diversifying its mix and reconfiguring its layout. We think it is appropriate to consider this, as, once the redevelopment proposals are completed, Digbeth is likely to become congested with market stalls and higher volumes of shoppers visiting the new shopping development.

8.33 This alternative could see the Market remain in a similar location to that described in Scenario 2, but would reduce the overall size of the market by centralising the stalls along Digbeth and Lower Hall Lane, and, potentially, Bradford St and part of Park St. This would enable sight lines to be maintained to all existing retail units, as the stalls would be located away from the shop frontages, and would provide an increased width for shoppers to filter past the market stalls on each side. Such an arrangement is successfully operated elsewhere, for example in New Street Birmingham.

8.34 We note that this form of layout has been proposed as part of a preferred option in one of the consultation responses, albeit as part of a short to medium term solution incorporating stalls in Lower Hall Lane and in part of the Market Square.

8.35 This potential permanent solution could be coupled with diversifying the offer of the Market and, as indicated above, with the Upper High Street alternative.

8.36 Whilst it is recognised that this is a radical solution in relation to the Market layout in Digbeth over recent years, we consider it potentially has considerable merit if implemented in conjunction with the redevelopment schemes, and with an extension into Upper High Street. On this basis, we recommend this option should also be assessed further as an alternative permanent solution to the location of the Market.

Overall Assessment of Scenarios

8.37 Scenario's 1, 2 and 3 present alternatives for the location of the Market in the short term, pending progress on the redevelopment and refurbishment schemes in the St Matthew's Quarter.

8.38 Our summary of the performance of each scenario against the identified criteria is set out below.

Criterion	Scenario 1: Current Location	Scenario 2: Current Location with Amendment	Scenario 3: Previous Location
Complies with Development Plan	+	+	++
Impact on Conservation Area	0	0	0
Impact on town centre vitality and viability as a whole	+	+	-
Accessibility – to town centre – to Digbeth area	 + +	 + +	 + -
Safety & security	0	0	0
Town Centre management	0	0	0
Consultation responses – retailers / investors – market traders	 -- ++	 *not known 0	 + --

*not fully consulted upon

8.39 The main findings of this summary are:

i) The differences in impact of market location and configuration are relatively marginal in the context of the town centre as a whole;

ii) The views of retailers / investors and the market traders are strongly at odds, to the extent that none of the locations will satisfy all parties, although it should be noted that Scenario 2 has not been fully consulted upon; and

iii) There is no clear scenario that outperforms the others.

8.40 In this situation, our assessment rests upon which of the Market locations is better for the town centre as a whole, having regard to the role that the Market plays in the current challenging economic climate.

8.41 As section 5 of our report demonstrates, the town centre faces significant pressures from the economic climate and edge of centre competition, leading to the continuing decline in its fortunes. Arresting this decline is of paramount importance, and overrides the interests of any constituent elements of the town centre, in this case, the Market, having regard to the size of its turnover. This is not to demean the importance of the Market to the town centre; indeed, given that it offers value goods that are clearly in demand in the present economic situation, the Market has shown expansion and improvement as described in Section 4. More importantly, the Market creates vitality and helps to mask some of the vacant and run down premises that are awaiting investment in the face of declining footfall in the primary shopping area. For the reasons explained, we do not think that the relocated position of the Market has caused the decline in footfall, but to the extent that it partially obscures the existing trading premises, it is affecting the trade of some existing established businesses.

8.42 The Market, therefore, remains an important part of the town centre, but its role must be kept in perspective, and not be allowed to threaten investment in existing retail premises, particularly Park St and Crown Wharf, or in the emerging redevelopment schemes in the St Matthew's Quarter. In this regard, although we are aware that discussions are progressing well with the relevant parties, at present there are no planning consents in place for either scheme, and no commencement dates. Any works are, therefore, unlikely to start within twelve months at the earliest. When works do start, it will be necessary to reposition stalls away from the relevant shop frontages to allow construction work to take place.

8.43 In these circumstances, and bearing in mind the strongly diverging opinions of key stakeholders, we consider that a further temporary solution is the most appropriate, pending clarification of the redevelopment proposals, and further consideration of an appropriate permanent home for the Market. This has a bearing on Scenarios 1, 2 and 3, as cost considerations and disturbance are relevant to a further temporary solution.

8.44 In our opinion, Scenario 3, relocating the Market to its original position, would harm it at a time when the town centre is experiencing considerable difficulties. The relocation of the Tesco store will create a large void in the central position within the Primary Shopping Area and further vacancies are unavoidable in the run-up to redevelopment in the St Matthew's Quarter. We therefore believe that moving the Market back to its original location in the current climate would be a retrograde step which is likely to adversely affect the vitality and viability of the town centre as a whole.

8.45 Scenario 2 attempts to address operational issues and some complaints. Whilst the Council amendments seek a positive response, our concern is that this is partial, and sets a precedent that could present difficulties for the Council, bearing in mind the extent of requests to remove stalls from shop frontages. We recognise that it is a priority for the Council to encourage the delivery of the redevelopment proposals in the St Matthew's Quarter, but we do not consider that it is essential to reposition the stalls at the eastern end of Digbeth ahead of the commencement of the refurbishment works which, as noted above, do not have planning permission or a commencement date as yet.

8.46 Scenario 1 would leave the Market in its current location. This is unpopular with a number of existing investors and retail occupiers because of adverse impacts on their businesses and this is a real concern. Whilst a number of objections could be addressed through improved market management (for example where complaints relate to vermin, litter or the sale of directly competing goods outside existing frontages), this will not address most of the objections received.

8.47 Notwithstanding the concerns of these key stakeholders, we consider that if a further consent is for a short period only, there are reasonable grounds to leave the Market in situ for that period. These include:

i) We do not consider that the retention of the stalls in their current position for a further temporary period would prejudice or threaten redevelopment plans in the town centre from coming forward.

ii) Leaving the stalls in their current location would be a pragmatic approach in the short term, in so far as all existing retailers and investors remain in the same position as regards the location of stalls and no one retailer's views take precedence over another;

iii) A further period for the Market in the current location would enable independent analysis to be undertaken to establish how much of the decline in retailers' turnover is attributable to the Market's relocation as opposed to the general economic situation. Similarly, further evidence of the turnover of the Market could be obtained to confirm whether the anecdotal evidence is supported;

iv) The benefits of an improved Market in terms of social inclusion, vitality and viability would help to "shore up" footfall and attract shoppers to the centre pending redevelopment in the St Matthew's Quarter; and

v) Further costs and disturbance would be minimised.

8.48 We have also considered a further variation to the layout to provide a 'reserve' area for stalls in Lower Hall Lane. This is shown in **Figure 8.1** as an extension to Scenario 1. This variation has merit in that it would offer a degree of flexibility to the Council to respond to urgent operational requirements and/or to accommodate stalls displaced by construction work, although it could not accommodate all displaced stalls if development work on both the Threadneedle scheme and the St Modwen scheme were to progress in tandem. This variation, however, has not been subject to consultation.

8.49 Our conclusion is that Scenario 1, retaining the Market in its current location, would be the most appropriate temporary solution subject to the following:

i) Minor amendments to kiosks and stalls number 29-30 in Bradford Street, 37-38 on The Bridge and 58 to reposition these in view of the operational difficulties experienced;

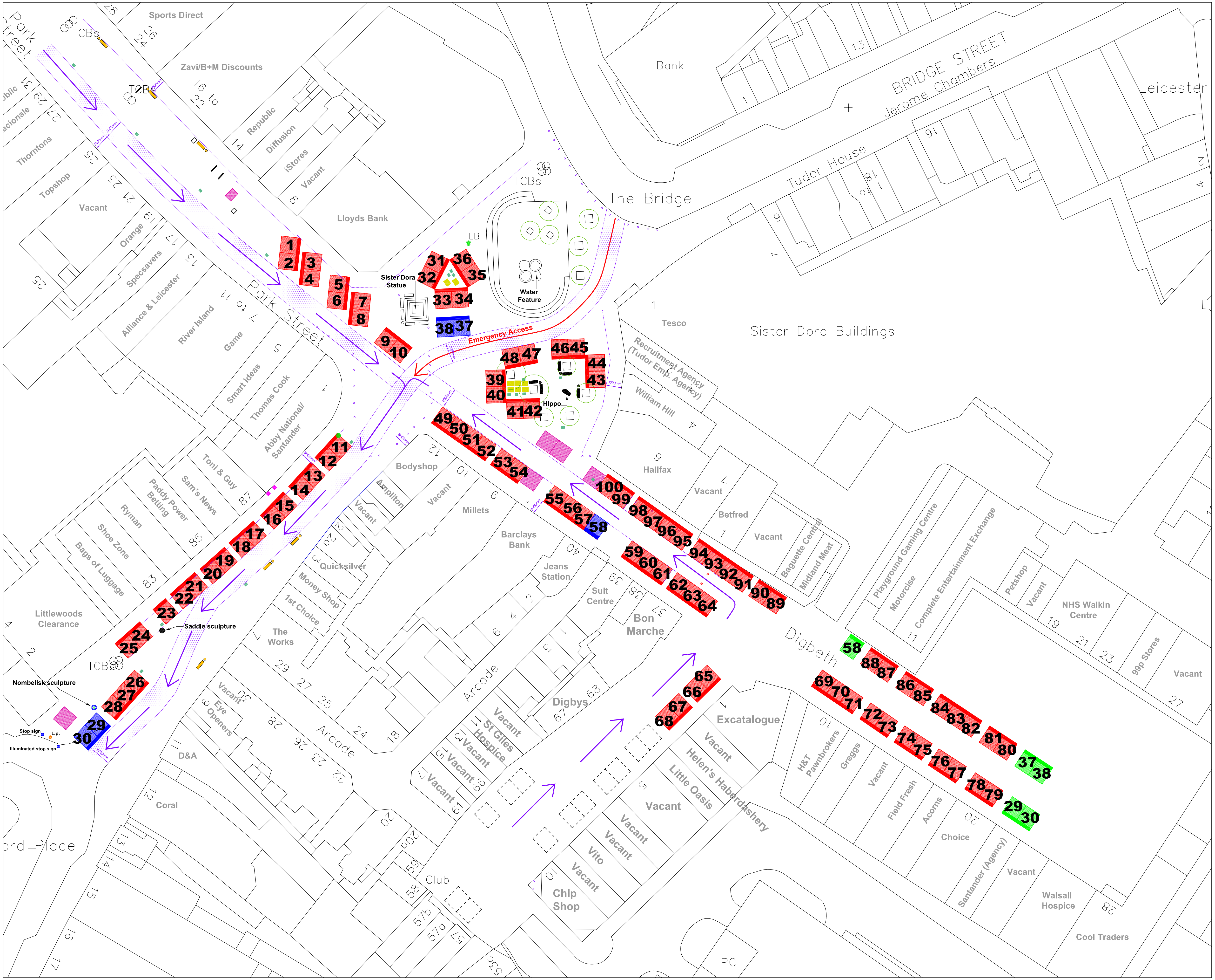
ii) The location of the meat wagon should be clarified and shown on the plan;

iii) The permission should be temporary (12 months) to enable to the Council to respond to the needs of development interests and to further assess the impact on existing traders and investors through independent survey and monitoring.

iv) The reserve area in Lower Hall Lane could be considered to provide flexibility in the event that redevelopment proposals came forward sooner than anticipated (ie within the 12 month period). This would allow amendments to be made to stall positions in order to ensure no delays or impediments to the commencement of redevelopment. We recommend, however, that if this revision is made to Scenario 1, the use of the reserve stalls should be linked to the commencement of redevelopment proposals.

WALSALL MARKET RELOCATION PLAN

Figure 8.1



key:

NORTH

- Emergency access only
- Access for traders & deliveries
- Existing stalls
- Existing stalls to be moved
- New location of stalls
- Food concession vans
- Reserve
- Proposed 1100 litre bins
- Proposed 360 litre bins
- Bins & benches within re-located position
- Bins & benches to be re-located
- Bins & benches to be removed
- Existing retractable bollards
- Existing fixed bollards

Walsall Council

REGENERATION - DEVELOPMENT & DELIVERY

PROJECT:	Figure 8.1 Market Location showing reserve stalls area
LOCATION:	Walsall Town Centre
DRAWING TITLE:	Regeneration Suggestions
SCALE:	1:250 @ A0 size DATE: 19th July 2010
DRAWN BY:	JAW/RO Dwg No.: No.4

9. CONCLUSIONS AND RECOMMENDATIONS

9.1 The key findings that have emerged from this update of the evidence base are that:

- The town centre as a whole is continuing to struggle, as indicated by lower overall comparison turnover, lower footfall and lower bus patronage. The main reasons, in our judgment, are the continuing economic uncertainty and competition from out of centre retail park and larger town centres; and
- The relocation of the Market is strongly supported by market traders as the Market has shown signs of improvement in the new position despite the difficult trading conditions. There are equally strong views expressed by those investors and retailers whose properties have market stalls outside their shops and who wish to have them removed because they are adversely impacting on trade and/or may be affected by proposed construction works. Conversely, some traders have been affected by the removal of stalls and loss of footfall associated with the Market.

9.2 In light of these findings our main conclusions are as follows:

- The long term viability of Walsall Town Centre is more reliant on private sector developers bringing forward improvements to their investments (for example, Norton and Proffitt / St Modwen and Threadneedle / Zurich) than it is on the Market. As both of these investors have plans to carry out extensive regeneration proposals to their holdings in the next 12-24 months, we consider that any planning consent in relation to the Market should be only for a further 12 months. This will allow a further assessment to be undertaken to respond to the changes necessitated by these schemes and with a view to finding an acceptable short-medium term solution;
- As so many existing retailers / investors have expressed concerns over the location of stalls outside their frontages, the simplest and most pragmatic course of action is to keep the stalls in their current position for the next 12 months rather than to attempt to address some stakeholder needs over others.

9.3 Our recommendations are, therefore, as follows:

1. That Walsall MBC should seek a further approval to retain the Market in its current location, subject to minor amendments to five stalls / kiosks and the meat wagon and consideration of a ‘reserve area’ for relocating stalls in Lower Hall Lane. The planning application should seek a further 12 months consent pending a review of progress on the redevelopment and refurbishment schemes in the St Matthew’s Quarter and the performance of the town centre as a whole.

2. During the next 12 months a relocation strategy should be formulated to:

- Seek to build consensus on both a short/medium term solution which would be compatible with the proposed redevelopment / refurbishment schemes and a permanent solution to the location of the Market;
- Investigate the options identified in relation to Scenario 4 to identify a permanent ‘home’ for the Market;
- Undertake further monitoring and independent assessment of the impact of the Market in its current position on both Market turnover and on retailers / investors;
- Make provision for the necessary funding to implement the relocation strategy; and
- Seek further improvements in the management of the Market in relation to maintenance, refuse collection and services.

Appendix A

Walsall MBC Study Brief 2010

St Matthew's Quarter, Walsall
Update of Evidence Base for Market Relocation 2010

1. Background

Project area
The St Matthew's Quarter in Walsall is a key area of the town centre where the Council and its partners continue to encourage retail-led investment, a position reflected in the Unitary Development Plan through policy WA10. All of the St Matthew's Quarter is included within the primary shopping area designation of the Unitary Development Plan. The area is envisaged as the focus for new comparison goods retail investment in the town centre, an improved street market and for an opportunity to improve the town centre's leisure offer. It is anticipated that development in the area will be delivered in a comprehensive manner and connect well with existing retail facilities to improve pedestrian circulation. An urban design brief has been developed to aid this process and to inform the level of high quality design and public realm anticipated in the St Matthew's Quarter. The grade II* listed St Matthew's church, which gives the area its name, provides a key landmark that characterises the town centre's skyline.

The St Matthew's Quarter is divided into two projects, split by Digbeth/High Street that forms part of the main north-west to south-east axis upon which the town centre has developed. To the north of Digbeth is the Old Square shopping centre, owned by Zurich Assurance, and currently including Tesco and Debenhams where redevelopment proposals are being considered by the landowners. To the south of this axis is land owned primarily by Norton & Proffitt/St Modwen, with a lesser interest held by the Council. Walsall's outdoor market has historically been located on the Digbeth/High Street axis, with some stalls currently in Lower Hall Lane, Park Street, Bradford Street and on The Bridge.

Phased approach to development
In June 2007, the first phase of the St Matthew's Quarter redevelopment was realised with the opening of a new Asda supermarket, the largest town centre Asda store in the country. This development was accompanied by a 1,000 space multi-storey car park, a small number of ground floor retail units and 45 apartments.

It was intended that phase 2 of the St Matthew's Quarter development would be delivered in 2007-8 through the conversion of the listed Shannon's Mill building into retail units, offices and 41 apartments by landowner Norton & Proffitt/St Modwen. Unfortunately, a fire destroyed the mill building in August 2007. A third phase of development was also planned (but it did not proceed to the planning stage) to redevelop the remaining Digbeth/Lower Hall Lane part of the St Matthew's Quarter for retail use. Critically, this third phase of development was expected to require part of the land occupied by the existing Walsall market in Digbeth, and therefore it was expected to include the provision of new stalls and supporting infrastructure for Walsall market.

Whilst considered a devastating blow to the regeneration of the town centre at the time, the Shannon's Mill fire has enabled the Council and its partners to consider a larger development opportunity in the area, which is bounded by George Street, Lower Hall Lane and Digbeth. This is effectively the land proposed for the second and third phases of development outlined above, and is indicated on the attached plan as one site, measuring approximately 4.2 acres/1.7 hectares. Phase 2 was the

southern part of the site on the attached plan A, and phase 3 the northern part. (see attached plan)
However, due to the economic climate there is no current planning consent for comprehensive redevelopment, though it is anticipated that the landowners will undertake some shop refurbishment and environmental improvements in the coming months.

Discussions are progressing well with the owners of the Old Square shopping centre and their agents concerning a major redevelopment of the centre. Driven by the relocation of Tesco to a new larger town centre premises, the owners are considering a redevelopment of the shopping centre to accommodate a major space user and other larger format retail units. If this redevelopment proceeds, it will require land in the former market square in Digbeth from the Council and will also facilitate the demolition of the Overstrand Restaurant.

<u>Operation of Walsall market</u>
Along with most retail markets across the country, Walsall market has seen its number of stalls, currently at about 90 stalls on peak days, and therefore its income, decline significantly over recent years. This decline can be largely attributed to national trends, such as the growing influence of supermarkets and discount retailers, as well as the current economic downturn. However, local issues have also been prominent in this decline, including the Shannon's Mill fire, which led to temporary road closures and disturbance whilst the Mill building was demolished, and this followed (largely) the similar temporary disturbance during the construction of the Asda store. Uncertainty and lack of progress with the investment proposals for the wider St Matthew's Quarter redevelopment have also had an impact on the leasing of retail units fronting the market in Digbeth, leading to an overall deterioration in that area of the town centre..

Due to how the service is currently managed, the decline in Walsall town centre market has had an impact on the overall profitability of the entire markets service (which also currently includes the management of markets in Bloxwich, Willenhall, and Darlaston) and has meant that corporate income targets for the markets service have not been achieved. In order to tackle the decline in Walsall market and to reverse the fortunes of one of the key elements of the town centre retail offer, and to maintain a coherent markets service which can provide some income, a political decision has been taken to support the temporary relocation of the market to a more central location within the town centre.

<u>Planning history to relocation of the market</u>
In recognition of the decline of Walsall market, a decision was taken in July 2008 by the Council to implement the temporary relocation of the market to the area around the Bridge. In order to deliver this relocation, a 3 year temporary planning consent was secured in August 2008, and steps were made to implement this decision. This planning application was made in advance of a wider planning application for the St Matthew's Quarter.

Unfortunately, following the threat of an application for judicial review into the planning consent from solicitors acting for Zurich Assurance, due to its potential impact on the attractiveness and viability of the Old Square, Counsel advised that the Council should revoke this planning consent. Furthermore, Counsel advised that if a further planning application were to be submitted that failed to address why the relocation is required in advance of a wider redevelopment at that particular point in time, and which could be supported by a robust evidence base, that the Council would be open to further legal challenge. In these circumstances, the Council revoked the temporary planning consent for the relocation of the market in autumn 2008.

Despite this set back, the political will remained to relocate the market, and advice was sought from specialist consultancies to provide a robust evidence base to support a further planning application. This commission was undertaken by GVA Grimley, who considered the impact upon the vitality and viability of the town centre as a whole if any of the 3 options noted below were implemented:

1. Market to remain in its original location (Digbeth)

2. Market to be temporarily located (for a period of up to 3years) to the area around The Bridge (16 stalls in Park Street)

3. Market to be temporarily located (for a period of up to 3 years) to a location that is a variant of option 2 (8 stalls in Park Street)

The Council submitted two parallel applications for planning permission, one each for option 2 and 3. Option 2 was refused planning permission and option 3, which included 8 stalls in Park Street secured planning consent for a limited period of one year. The one year planning consent was awarded so that the local planning authority could make a judgement as to the overall impact of the temporary relocation on the viability and vitality of the town centre, without making a longer commitment which may have an adverse impact upon the centre. This consent will cease on 28th October 2010. (Current market location plan attached)

2. Consultancy advice required

Consultancy advice is now required to update the evidential base that supported the planning application last year for the temporary relocation of the market to the Bridge, Park Street, Lower Hall Lane and Digbeth. This evidence needs to establish the impact of the relocation to date on the vitality and viability of the town centre as a whole. In order to reach this position, consultancy advice is required on the elements outlined below.

In recognition of the previous threat of judicial review, the advice will need to be robust in the event of further legal challenge. This is of course subject to any planning application, if submitted, being granted by the local planning authority.

<u>The overall task</u>
A professional judgement and conclusion on whether the contribution the market makes to the vitality and viability of the town centre as a whole remains significant in its relocated position. The assessment should consider whether the interests of the centre as a single entity take precedence over the interests of an element that makes up that centre. Alternatively, that professional judgement may conclude that the market's contribution is not as significant, and/or that the relocation of the market has had a negative impact upon the vitality and viability of the town centre, and should not therefore be maintained in its current location and should return to its original location in Digbeth.

<u>Detailed advice</u>
Detailed advice is required on the following matters, and where applicable all points should consider the different permutations of the temporary relocation of the market, (for 3-5 years or less, considering the current 1 year term of the planning

permission), the possibility of a permanent relocation, the return of the market to its original location in Digbeth or advice on alterations to the layout of the market in its current location. Advice should also consider if any new locations within the town centre may be applicable for Walsall market.

1. The impact on the vitality and viability of the town centre as a whole, from both a retailer and development/investment perspective, if the current market were to remain in its relocated position. This should include an assessment of the impact on the constituent parts of the town centre, including the area formerly occupied by the market, and other parts of the town centre, including the Saddlers Shopping Centre, the Old Square shopping centre and Park Street/The Bridge.

2. The impact upon the market itself, if it were to:
   - remain in its relocated position,
   - remain in its relocated position with some adjustments,
   - return to its original location,
   - or relocate to another position in Walsall town centre.

   This should include an analysis of the relative importance of the market to the overall vitality and viability of the town centre under each scenario. Consultation on this matter would need to include a representative proportion of the market traders themselves, through the Walsall Market Traders' Association (facilitated by Council officers)

3. The various scenarios for the future of the market need to include an assessment on the effectiveness of the new operational market management arrangements in making the town centre and the market attractive to investment, and what steps should be taken to minimise any adverse impact upon retailers and shoppers if further changes are recommended to the relocation of the market.

4. The analysis should be based upon town centre health check indicators, such as yields, vacancy rates, rental levels, etc, and should provide a full and comprehensive update of the advice provided within the 'St Matthews Quarter – Relocation of Walsall Market, September 2009' report undertaken by GVA Grimley.

5. The analysis should be shaped through "soft market testing" discussions with a cross-section of retailers/major landowners/agents/developers/investment institutions who currently operate in the town centre, and also a cross section of those who are not currently represented in the town centre. Discussions will also be required with the emergency services and other bodies with an interest in the town centre. The list of proposed consultees should be agreed by the Council.

The above advice will need to be provided within certain parameters, including:

- Taking into consideration the current and predicted economic position to inform policy and actions now and in the future.

- Taking account of existing planning policy in the Walsall Unitary Development Plan, the West Midlands Regional Spatial Strategy Phase 1 Revision, the emerging West Midlands Regional Spatial Strategy Phase 2 Revision (Examination in Public, April – June 2009) and the emerging work on the Black Country Joint Core Strategy. This should include reference to all supporting technical work, which will be provided on appointment to the successful consultancy team.

- Taking account of development proposals for Walsall town centre, especially emerging proposals form Threadneedle, those planned in competing town/city centres, and out-of-town locations.

- Reference to any new (not considered in previous advice) case study examples of similar market relocations which have impacted positively and negatively upon the vitality and viability of town centres.

- Taking into consideration previous work undertaken by GVA Grimley as well as financial and tenant management information.

- Making clear that all discussions with market traders, retailers, investors and developers are undertaken confidentially, and reported appropriately in a confidential appendix. A suitable desensitised version of the appendix will be needed for public use as part of the planning application.

- Acting confidentially and recognising the sensitivities of this commission. Consultants should make sure that there are no conflicts of interest with other work being undertaken for neighbouring authorities or strategically within the region or sub-region.

- Recognising that Counsel's opinion may be sought on the robustness of the conclusions of the report before the next step is taken in submitting a planning application.

3. Consultancy requirements

It is anticipated that a mixture of consultancy expertise and disciplines, including valuation, planning, research and economic development skills, may be required to undertake this commission. Therefore, either one multi-disciplinary consultancy or a consortium of consultancies would be appropriate to undertake the commission.

Consultants are asked to submit a proposal which outlines the methodology that would be used to provide the advice required by the Council. This submission should be limited to 10 sides of A4 paper and should clearly include a fixed price fee for the proposal. The CVs of the staff proposed to undertake each stage of the commission, together with the time input of each team member, should be included as an appendix to the main 10 sided submission.

The Council will consider the proposed methodology, and the skills and experience of the proposed consultancy team. The fixed price fee proposed for undertaking the work will also be a determining factor, but the Council is not bound to accept the cheapest, or any, fee proposal. It is not expected that an interview process will be required.

In the event that a future planning application is challenged and further specialist advice was required, consultants are asked to provide a day-rate that they would charge if this materialised. This should be noted separately from the fee required to deliver this commission.

Consultants are asked to confirm in their submission that they can deliver a high quality piece of work that meets the tight timescale noted below and which will be robust in the event of legal challenge. The consultants will need

to confirm in writing their willingness to represent their conclusions through any planning appeals, examinations and/or legal proceedings.

4. Timescales

Due to the current planning permission ceasing on 28th October 2010, there is real need to ensure that consultants are able to complete this commission so that a further planning application, with the necessary supporting evidence, can be submitted during July 2010. This will be critical to maintaining continuity of operation of the market. Therefore, any submissions should be submitted by 12 noon on the 4th June 2010 to the address below. An appointment will be made on the 7th June 2010. An inception meeting will be held on the afternoon of the 9th June 2010. The commission must be completed by the 19th July 2010.

As noted above, consultants are asked to confirm that they can meet the requirements of the brief to the appointed timescale.

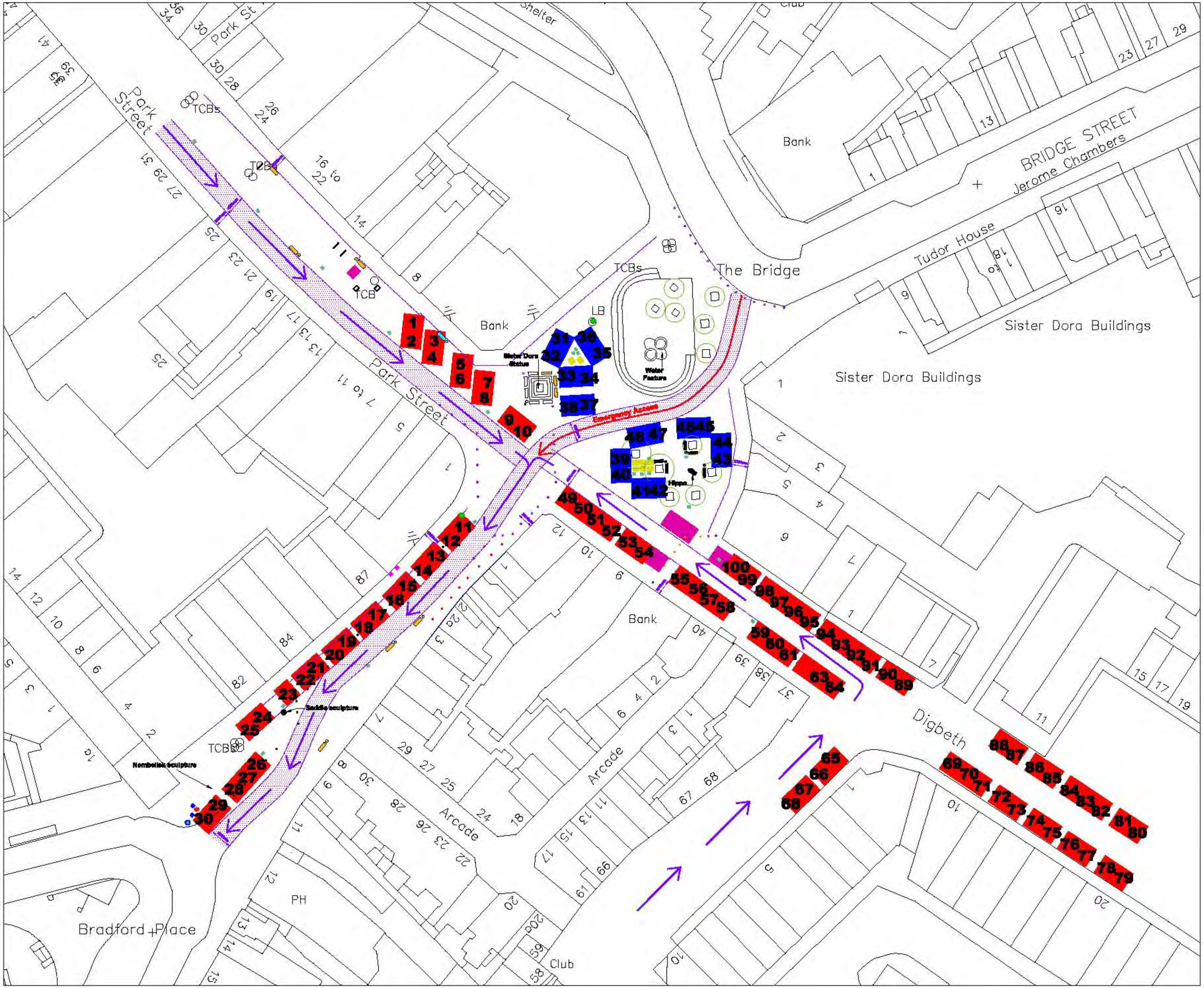
5. Contact details

Proposals should be submitted to the name and address below, in an envelope marked private and confidential, or to the email address below. Any questions regarding the Council's requirements on this matter should be directed to the same place, or to Richard Chadwick on 01922 652576 and chadwickr@walsall.gov.uk:

Cherry Shine
Principal Regeneration Officer
Development and Delivery Service
Regeneration Directorate
Walsall Council
Civic Centre
Darwall Street
Walsall
WS1 1DG

Tel: 01922 652537
E-mail: shinec@walsall.gov.uk

WALSALL MARKET RELOCATION PLAN



NORTH

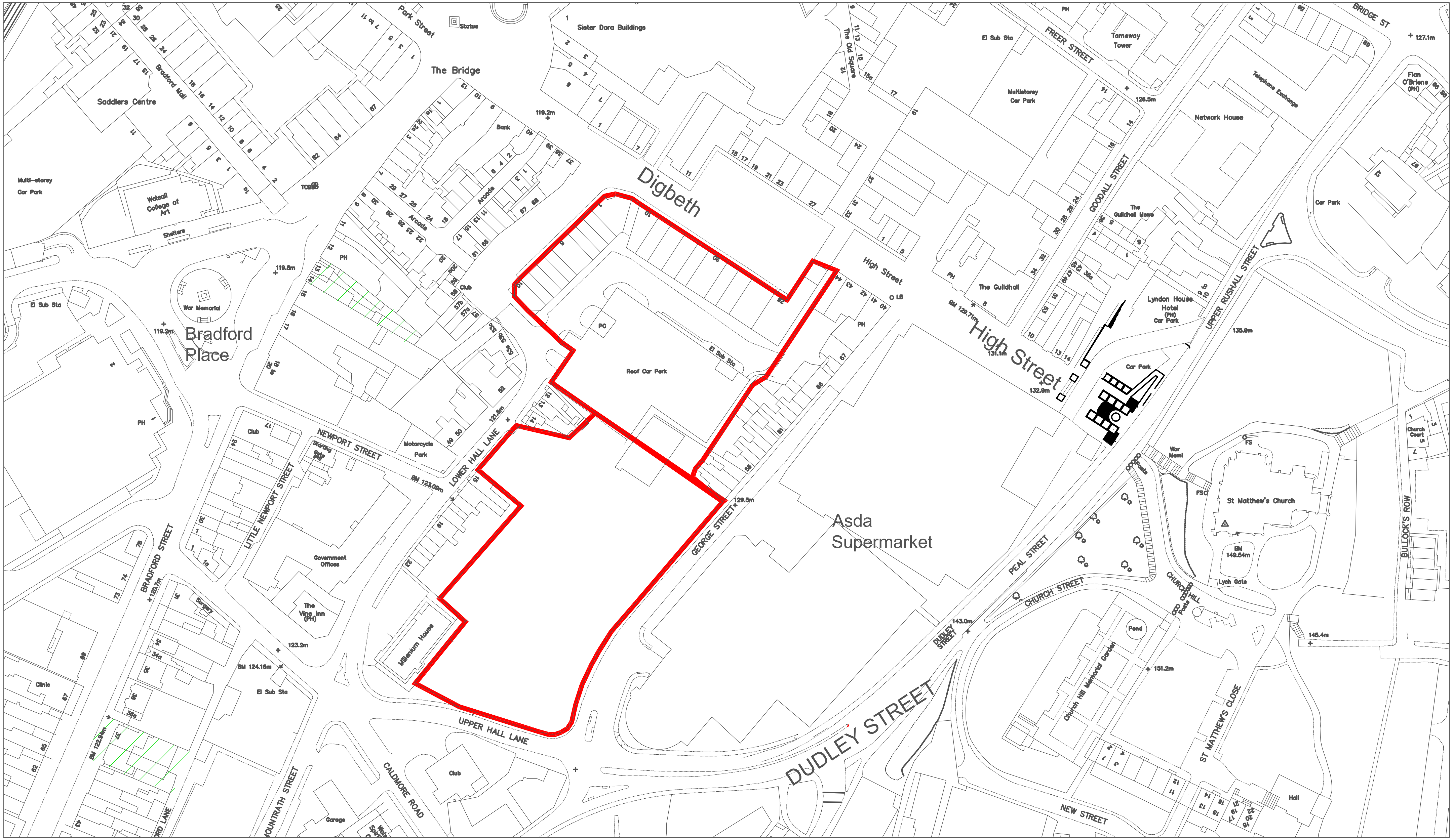
key:

- Emergency access only
- Access for traders & deliveries
- Proposed food traders
- Food concession vans
- Other market trader stalls
- Proposed 1100 litre bins
- Proposed 360 litre bins
- Bins & benches within re-located position
- Bins & benches to be re-located
- Bins & benches to be removed
- Existing bollards to be removed

REGENERATION - DEVELOPMENT & DELIVERY

PROJECT:	Walsall Market Relocation
LOCATION:	Walsall Town Centre
DRAWING TITLE:	Proposals Plan
SCALE:	1:250 @ A0 size DATE: 5th November 2009
DRAWN BY:	JAW/RO Dwg No.: V21

St Matthews Quarter, Walsall - Retai-led Investment Opportunity



Walsall Council

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Scale: 1:500 @ A4 size

Date 23/7/2009

Appendix B

Walsall UDP Policies

- **Policy GP1: The Sustainable Location of Development** – Development will be encouraged in accessible locations, minimising the need to travel, especially by private car. These locations include within, or on the edge of town, district or local centres;
- **Policy GP2: Environmental Protection** – All developments will be expected to make a positive contribution to the quality of the environment and the principles of sustainable development;
- **Policy GP4: Local Area Regeneration** – Comprehensive local area regeneration initiatives will be encouraged where they revitalise the economy, help to sustain established centres, enhance the built environment, improve accessibility, improve the amenity offer, bring forward derelict land / buildings and improve safety and security;
- **Policy GP5: Equal Opportunities** – Development proposals should ensure that the needs of all sections of the community are properly taken into account, in particular those who are disadvantaged;
- **Policy GP6: Disabled People** – Developments which the public have access to will only be permitted if they are designed to provide good access to disabled people;
- **Policy GP7: Community Safety** – Proposals should have regard for the objective of 'designing out crime' through a number of measures including maximising surveillance, CCTV, a high standard of street lighting and security shutters;
- **Policy T1: Helping People to get Around –** The Council will improve public transport, require the sensitive design of shopping centres and other large developments to ensure convenient car parking, unobstructed access and a range of accessible facilities and ensuring that street furniture does not inhibit access;
- **Policy ENV9: Environmental Improvement Initiatives** – Environmental Improvement Initiatives will be located in a number of locations including town centres. The Council will work with local communities and / or partner agencies to identify environmental improvement schemes;
- **Policy ENV27: Buildings of Historical or Architectural Interest** - Any form of development involving a listed building or its setting will only be permitted where it can be demonstrated that the appearance, character and value of the building and its curtilage are not adversely affected;
- **Policy ENV28: The 'Local List' of Buildings of Historical or Architectural Interest –** Planning permission will not be granted for a development scheme which proposes the demolition or adverse alteration of a 'local list' building;
- **Policy ENV29: Conservation Areas –** The Church Hill Conservation Area and Bridge Street Conservation Area are relevant to the assessment of the market relocation options.

Any development proposals will have to preserve or enhance the character and appearance of the Conservation Areas in terms of scale, massing, design and materials as well as any impact on traffic levels;

- **Policy ENV32: Design and Development Proposals** – Poorly designed proposals which do not take into account the site context or surroundings will not be permitted. This policy has particular significance for a number of locations including town centre, Conservation Area or a priority area for environmental improvement;
- **Policy S1: Definition of Town Centre Uses** - Town centre uses comprise the following: retailing of all kinds (convenience, comparison, warehouse clubs, retail outlets and retail markets), A2 (financial and professional offices), B1a (offices), A3 (food, drink and public houses), C1 and D1 (hotels, entertainment, leisure, sports) and D2 (community and health facilities) uses;
- **Policy S2: Hierarchy of Centres** – Walsall is identified as the 'Main Town Centre'. It will be sustained and enhanced in its sub-regional role offering comparison retail and other town centre uses. It is recognised that Walsall has a local role, meeting the needs of adjacent communities for convenience shopping and local amenities and services;
- **Policy S3: Integration of Design into Developments** – Town centre developments should be of a scale and nature appropriate to the size and function of the centre. They should also be sensitively integrated in functional and visual terms with the primary shopping area and other land uses;
- **Policy S4: Town and District Centres, General Principles** – The range and quality of shopping, leisure and other town centre uses will be sustained and enhanced. The priority will be to safeguard the existing level of shopping, leisure and other provision. In some centres there is scope to increase these uses to maintain their vitality and viability. Within the primary shopping area, the predominant ground floor use should be retail;
- **Policy WA1: Primary Shopping Area** – This area comprises Park Street / Digbeth / High Street and extends into Bradford Street, Bridge Street, Old Square and The Saddlers Centre. New retail floorspace will be concentrated within, and adjacent to, this area. Redevelopment schemes for the Digbeth area will be particularly encouraged;
- **Policy WA2: The Market** – The importance of the Market is recognised as an attraction for visitors and its significant role in meeting the needs of the community. Where required, the Council will carry out improvements to the operation and setting of the Market in order to maintain and increase its attractiveness, specifically encouraging redevelopment in the Digbeth area. The policy also references the need to enhance Old Square and the St Matthew's Quarter given they provide the setting for the Market;

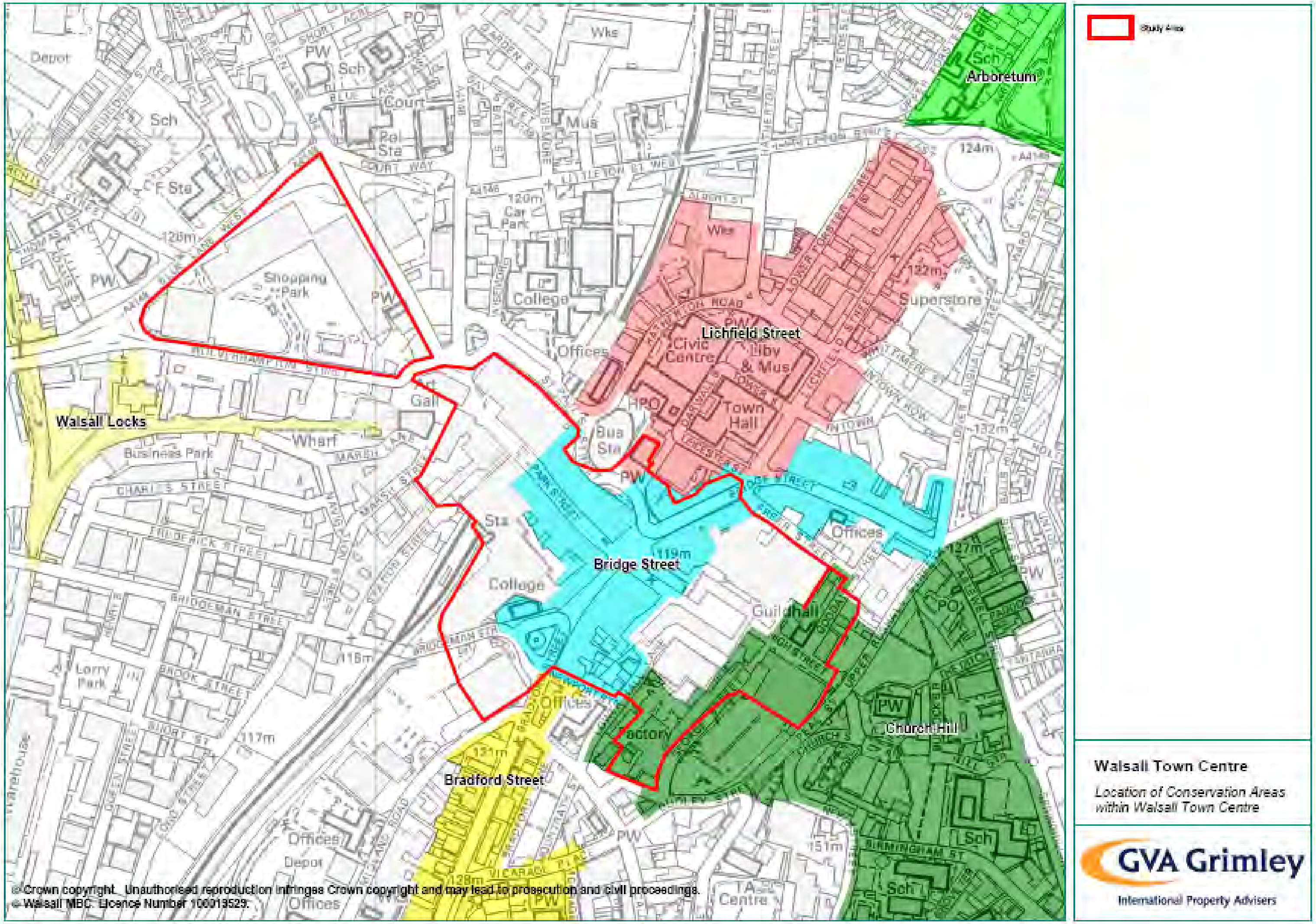
- **Policy WA3: Other Town Centre Uses** – Outside of the primary shopping area, and on upper floors within it, offices, leisure, community uses and, in some cases, residential development will be permitted;
- **Policy WA5: Conservation Areas and Areas of High Townscape Value** – A number of areas are identified as making an important contribution to the character and / or townscape of the town centre. Those that fall within the study area are: The Bridge (particular buildings, the overall scale and the 'space'), Bridge Street (part of) and the east side of High Street. The Church Hill Conservation Area lies at the south-eastern end of the Study Area (see the plan overleaf);
- **Policy WA6: Community Safety – CCTV** – The Council will seek to extend the coverage of the Walsall Town Centre CCTV system;
- **Policy WA7: Development / Investment Opportunities** – Six areas with significant development / investment potential are identified. These include Lower Hall Lane / Digbeth / Old Square, the majority of which falls within the study area;
- **Policy WA10: Lower Hall Lane / Digbeth / Old Square** – Major comparison goods retail investment over the next five to ten years will be concentrated here. There are two significant opportunities as follows: the reconfiguration and refurbishment of the Old Square Shopping Centre; and the retention of historical frontages and buildings of architectural / historical value within Digbeth / Lower Hall Lane and George Street area; and
- **Policy WA19: Pedestrians, Cyclists and Disabled People –** Priority will be given within the primary shopping area to disabled people, pedestrians and cyclists.

The following policies taken from the 'Designing Walsall' SPD are relevant to the St Matthew's Quarter and wider study area:

- **Policy DW2: Safe and Welcoming Places –** New developments should contribute to creating places where people feel safe through minimising opportunities for crime and making places feel welcoming;
- **Policy DW4: Continuity** – Attractive spaces within new development should be defined or enclosed by buildings, structures and / or landscape. Consideration must be given to the distinction between public and private space, accessibility of buildings and spaces and the existing urban structure;
- **DW5: Ease of Movement** – New development should contribute to creating places that are easily connected and safe to move through. It must prioritise the needs of pedestrians and encourage sustainable modes of transport such as cycling and public transport;

- **DW6: Legibility** - New development make a positive contribution to the identity of an area and maximise the potential to enhance local distinctiveness by making contributions to street furniture, lighting and signage;
- **DW9: High Quality Public Realm** – New development should ensure that it creates places by using high quality materials, public art and landscaping, as well as maximising 'active frontages' and minimising 'dead frontages'; and
- **DW10: Well Designed and Sustainable Buildings** – New development should make a positive contribution to creating a comfortable, adaptable and sustainable built environment through carefully designed buildings, and the sustainable use of resources.

Conservation Areas



Appendix C

Walsall MBC Shopper Survey 2010 Questionnaire

Walsall Council

Walsall Street Market Customer Feedback Survey 2010

Walsall Council is surveying people using Walsall Market out to find out what they think about the market in general and its current layout and location which changed in November 2009. Your responses will be used to inform a wider study into Walsall Town Centre's prosperity and as well as inform any planned changes or improvements Walsall Market overall.

INTERVIEWER: IF INTERVIEWING A CHILD / YOUNG PERSON WHO YOU FEEL IS UNDER THE AGE OF 14, PLEASE FIRST CHECK THEIR AGE (QUESTION 18). IF AGED UNDER 14 YEARS PARENTAL PERMISSION MUST BE OBTAINED BEFORE PROCEEDING (QUESTION 19).

1. How often would you say you use Walsall market?

INTERVIEWER: DO NOT PROMPT, CHECK OPTIONS WITH THEM IF NEEDED. TICK ONE ONLY.

- ☐ *At least once per week* 1
- ☐ *Less than once a week but more than once a month* 2
- ☐ *Once a month* 3
- ☐ *Once every 2 - 3 months* 4
- ☐ *Once every 4 - 6 months* 5
- ☐ *Less than once every 6 months* 6
- ☐ *Never / this is my first visit* 7
- ☐ *Don't know* 8

2. I am going to ask you to rate a number of things to do with Walsall market. Looking at card 1, please tell me if you think the aspect I read out is Very good, Good, OK, Poor or Very poor. If you don't know please say so.

INTERVIEWER: SHOWCARD 1. TICK ONE ONLY ON EACH ROW.

	Very good	*Good*	*OK*	*Poor*	*Very poor*	*Don't know*
The quality of goods on offer	1	2	3	4	5	6
The choice and variety of goods and products available	1	2	3	4	5	6
The convenience of operating times	1	2	3	**4**	5	6
General value for money	1	2	3	4	5	6
The friendliness of traders	1	2	3	4	5	6
The general atmosphere of the market	1	2	3	**4**	**5**	6
The way the market is managed	1	2	3	4	5	6

3. I am now going to ask you to rate a number of things to do with the current layout and location of Walsall market. Still looking at card 1, please tell me if you think the aspect I read out it is Very good, Good, OK, Poor or Very poor. If you don't know please say so.

INTERVIEWER: SHOWCARD 1. TICK ONE ONLY ON EACH ROW.

	Very good	*Good*	OK	*Poor*	*Very poor*	*Don't know*
Layout of stalls and access around the market	1	**2**	3	4	5	6
Appearance of market stalls	1	2	3	4	5	6
Cleanliness of site	1	2	3	4	5	6
Ease of access	1	2	3	4	5	6
Market location	1	2	3	4	5	6

4. In November 2009 the location and layout of Walsall market changed slightly. Did you use the market before it moved in November 2009?

INTERVIEWER: TICK ONE ONLY.

- ○ 1 INTERVIEWER: GO TO QUESTION 5
- ○ 2 INTERVIEWER: GO TO QUESTION 6

5. **I am going to read out a number aspects relating to the new layout and location of Walsall market. Using the options on card 2 please tell me to what extent you think the market has got better or worse or stayed the same <u>since it's location and layout was changed</u>. If you don't know please say so.**

INTERVIEWER: SHOWCARD 2. TICK ONE ONLY ON EACH ROW.

	Much better	*Better*	*No change*	*Worse*	*Much worse*	*Don't know*
The appearance of Walsall market	1	2	3	4	5	6
Finding your way around the market stalls	1	2	3	4	5	6
Access into and out of Walsall market	1	2	3	4	5	6
The profile of the market	1	2	3	4	5	6

INTERVIEWER: ASK ALL

6. **Do you think Walsall market should stay in its current layout and location, go back to the old layout and location, change slightly or relocate somewhere different in the town?**

INTERVIEWER: TICK ONE ONLY.

- ☐ *Stay in its current layout & location* 1 INTERVIEWER:GO TO QUESTION 8
- ☐ *Change slightly from its current layout & location* 2 INTERVIEWER:GO TO QUESTION 7
- ☐ *Go back to the old layout & location* 3 INTERVIEWER:GO TO QUESTION 8
- ☐ *Change slightly from its old layout & location* 4 INTERVIEWER:GO TO QUESTION 7
- ☐ *Locate somewhere else* 5 INTERVIEWER:GO TO QUESTION 7
- ☐ **Don't know** 6 INTERVIEWER:GO TO QUESTION 8

7. **What would you change slightly / where would you locate the market and why?**

INTERVIEWER: PLEASE RECORD AS MUCH INFORMATION AS POSSIBLE INCLUDING REASONS WHY.

1

INTERVIEWER: ASK ALL

2. **Look at card 3. How safe or unsafe do you feel when using Walsall Market?**

INTERVIEWER: SHOWCARD 3, TICK ONE ONLY.

○ *Very safe* 1 ○ *Fairly safe* 2 ○ *Neither safe nor unsafe* 3 ○ *Fairly unsafe* 4 ○ *Very unsafe* 5 ○ *Don't know* 6

8. **Do you have any comments on the current layout and location of Walsall Market?**

INTERVIEWER: PLEASE WRITE IN BELOW.

1

9. **Looking at card 4. Generally thinking, do you think that Walsall market has a positive or negative impact on the town?**

INTERVIEWER: SHOWCARD 4, TICK ONE ONLY.

○ **Very positive** 1 ○ *Positive* 2 ○ *Neither* 3 ○ *Negative* 4 ○ *Very negative* 5 ○ *Don't know* 6

10. **Why do you say this? INTERVIEWER: PLEASE WRITE IN BELOW.**

	1

11. **If you could recommend one thing to improve Walsall Market, what would it be?**

INTERVIEWER: PLEASE WRITE IN BELOW.

	1

12. **Now look at card 5. Please read out the Walsall Town Centre stores or facilities you have visited / used in the last 6 months. Please just read out the number next to the answer(s).**

INTERVIEWER: SHOWCARD 5TICK ALL THAT APPLY.

- ☐ *Argos* 01
- ☐ *Barclays Bank* 02
- ☐ *BHS* 03
- ☐ *Body Shop* 04
- ☐ *Boots (Park Street) / Superdrug* 05
- ☐ *Co-operative Bank* 06
- ☐ *Debenhams* 07
- ☐ *Diffusion / Republic* 08
- ☐ *HSBC Bank* 09
- ☐ *Littlewoods Clearance* 10
- ☐ *Lloyds TSB Bank* 11
- ☐ *M&S* 12
- ☐ *Miletts* 13
- ☐ *Natwest Bank* 14
- ☐ *New Look* 15
- ☐ *Perfect Home* 16
- ☐ *Tesco Metro* 17
- ☐ *The Works bookshop* 18
- ☐ *TJ Hughes* 19
- ☐ *Toni and Guy* 20
- ☐ *Top Shop / River Island* 21
- ☐ *Wilkinsons* 22
- ☐ *Yorkshire Bank* 23
- ☐ *None of these* 24
- ☐ *Don't know* 25

About you

Please can I ask a few questions about you? This will help us understand people's responses in more detail and help with our reporting. All questions are voluntary.

13. **What is your home postcode?**

	1

14. **Do you work or study in Walsall Town Centre? INTERVIEWER: TICK ONE ONLY.**

○ *Work* 1 ○ *Study* 2 ○ *Neither* 3

15. **You are...? INTERVIEWER: DO NOT ASK, TICK ONE ONLY.**

○ *Male* 1 ○ *Female* 2

16. **Do you consider yourself to be disabled?**

INTERVIEWER: READ OUT IF NECESSARY. TICK ONE ONLY.

The Disability Discrimination Act considers a person disabled if:

You have a longstanding physical or mental condition or disability that has lasted or is likely to last at least* 12 months, and this condition or disability has a substantial adverse effect on your ability to carry out *normal day-to-day activities. A long-standing illness, disability or infirmity is defined as; anything that has troubled you over a period of time or that is likely to affect you over a period of time.

○ *Yes* 1 ○ *No* 2

17. **Look at card 6. Which of the following best describes your ethnic background? Please just read out the number next to the answer.**

INTERVIEWER: SHOWCARD 6. TICK ONE ONLY AND / OR WRITE IN.

- *White - British* 01
- *White - Irish* 02
- *White - Other* 03
- *Mixed - White and Black Caribbean* 04
- *Mixed - White and Black African* 05
- *Mixed - White and Asian* 06
- *Black - British* 07
- *Black - Caribbean* 08
- *Black - African* 09
- *Other Black background* 10
- *Indian* 11
- *Pakistani* 12
- *Bangladeshi* 13
- *Other Asian background* 14
- *Chinese* 15
- *Any other ethnic background* 16
- *Prefer not to say* 17

Other ethnic background, please write in below.

1

18. **Look at card 7. What is your age group? Please just read out the number next to the answer.**

INTERVIEWER: SHOWCARD 7. TICK ONE ONLY.
*** PARENTAL PERMISSION REQUIRED FOR CHILDREN AGED UNDER 14, SIGNATURE NEEDED.**

- *Under 14 years** 1
- *14 - 16 years* 2
- *16-24 years* 3
- *25-34 years* 4
- *35-44 years* 5
- *45-54 years* 6
- *55-64 years* 7
- *65 years or older* 8

19. **As the parent / guardian / responsible adult for this child I give permission for Walsall Council to complete this interview. Please sign below.**

1

Thanks for your time.
You have been interviewed by INTERVIEWER NAME on behalf of Walsall Council.
HAND INFORMATION FLYER.