

Walsall Council

Walsall Market

Location review and evidence base

ARP-WAL-EVB

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This report takes into account the particular instructions and requirements of our client.

It is not intended for and should not be relied upon by any third party and no responsibility is undertaken to any third party.

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Walsall Council

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1 Introduction

Established in 1219, Walsall Market has a good reputation throughout the West Midlands and forms part of the heritage of the town centre, a tradition that Walsall Council and the community wish to maintain. With a vast array and variety of stalls, the market also provides important leisure and retail opportunities for visitors to Walsall.

1.1 Purpose of this report

This report provides a review of the potential locations for the new Walsall Market and provides an important evidence base to the preferred market location and design. The report is required to:

1. Reconsider the The Bridge, Bradford Place and Digbeth as the preferred location for the new Walsall Market in light of the current context;
2. Review again the potential locations for the new Walsall Market including those previously considered by GVA and The Retail Group;
3. Undertake a high level analysis of the importance of the market to the overall vitality and viability of Walsall town centre; and
4. Support a full planning application for the permanent location of Walsall Market and associated public realm improvements.

1.2 Arup's commission

We have been appointed by Walsall Council to prepare a feasible, viable and financially sound proposal for a new permanent location for Walsall Market. We have prepared this evidence base, as a starting point, from which we have prepared detailed design proposals. These proposals will be taken forward by a full planning application to Walsall Council.

Structure of this report

- Section 2 – a review of the previously considered market locations in the GVA studies;
- Section 3 – a review of the current market and preferred location in order to identify objectives for the new market;
- Section 4 – revised market location criteria based on the objectives identified in Section 3;
- Section 5 – identifies potential market locations;
- Section 6 – provides an assessment of the identified market locations based on the location criteria concluding in Section 4; and,
- Section 7 – recommends a permanent location for the market.

2 Key considerations

The following are key considerations in our review of potential market locations:

- Retail trends;
- Major development proposals within Walsall Town Centre;
- Planning history;
- The emerging Area Action Plan (AAP) for Walsall Town Centre;
- Previous studies; and
- The need for further evidence.

2.1.1 Retail trends

Previously Walsall Market had experienced a decline in income and a fall in the occupancy rates of its stalls. This was considered in part to be due to wider retailing trends and a reduced occupancy of retail units in the St Matthews Quarter- Market Square, High Street and Digbeth area of the town centre. The market is influenced by the major redevelopment plans for this area which will affect pedestrian numbers amongst wider regeneration trends.

2.1.2 Major development proposals within Walsall town centre

There are two major retail redevelopment proposals in the town centre for part of Digbeth and The Old Square Shopping Centre (the former Tesco Metro Store proposal) and at Digbeth and the Lower Hall Lane area (Norton and Proffitt proposal). Both will affect parts of the preferred market locations and need to be considered in regard to the permanent relocation and its implementation.

2.1.3 Planning history

Since 2007, Walsall Council has pursued the temporary relocation of Walsall Market to The Bridge, Park Street, Bradford Street and lower Digbeth. The temporary relocation was undertaken to curtail the decline of the market and its impact on the town centre visitor numbers and to make way for major retail proposals within the St Matthews Quarter.

Two planning applications were submitted in 2008 (08/1084/FL and 08/1624/FL) for the temporary relocation of Walsall Market and were withdrawn due to the potential of judicial review from adjacent land owners and their tenants.

In light of the surrounding major development proposals and the contention associated with the market location a detailed study was undertaken by the Council and GVA (the GVA 2009 Study).

The GVA 2009 Study provided an analysis of the viability, vitality and economic impact of the market's proposed temporary relocation. Subsequently a planning permission was granted in October 2009 for the temporary (12 months) relocation

of Walsall Market from Digbeth and Lower Hall Lane to The Bridge, Bradford Street, Park Street and lower Digbeth (09/1277/FL).

The GVA 2009 Study was then updated in 2010, following which planning permission was granted to retain the market in its temporary location for a further 12 months (10/1181/FL). Subsequent planning permissions were granted in October 2011 and June 2013 which extended the time limit of the market location until April 2015.

In June 2012, the Council's Regeneration Scrutiny and Performance Panel formed the Markets Working Group. The group agreed that the creation of a new permanent market location is a priority. The Group appointed GVA and The Retail Group to undertake a study on the options for the permanent location of Walsall Market and to make recommendations for the preferred location (GVA 2012 Study). The GVA 2012 Study concluded that The Bridge and Bradford Street was the preferred location for the new permanent market.

2.1.4 Walsall Town Centre Area Action Plan (AAP)

Walsall Council has commenced the preparation of an AAP, with ambitious regeneration aims for Walsall town centre. Public consultation was undertaken on an Issues and Options report in June 2013. This consultation raised the question of the market location. It presented two options, to pursue the preferred permanent location for the market on The Bridge and in Bradford Street or to consider other potential indoor and outdoor locations for the market. A limited number of responses were received to the AAP consultation, in relation to the market location, which proved inconclusive.

2.1.5 The need for further evidence

In regard to the emerging policy framework, major retail development proposals and the wider changing context further consideration needs to be given to a permanent market location. Collecting an up-to-date evidence base for the preferred permanent location of Walsall Market is paramount.

This Location Review and Evidence report is integral to the updated evidence base and will review the preferred location in light of the current context.

3 Previously considered market locations

3.1 Overview

The GVA 2012 Study considered six alternative locations for the market. These were alternatives to the identified preferred location of The Bridge and Bradford Street. The six alternatives are listed below and shown in Figure 1 below.

1. Victorian Arcade;
2. Old Square Shopping Centre;
3. Shannon's Mill;
4. Upper High Street;
5. Saddlers Centre; and
6. Jerome Retail Park.



Figure 1: Locations considered by GVA study.

Each of the six locations were assessed in terms of quality of location, proximity to core retail offer, levels of existing uses, health and vitality, relevance of existing uses and adjoining users.

3.2 Location requirements

In identifying these locations, the study defined the following location requirements:

- Visibility;
- Accessibility;
- Proximity to the retail core;
- Size to accommodate circa 100 stalls; and
- Policy compliance.

Planning Policy requirements considered were defined as follows:

- Is the location within the primary shopping area (PSA)?
- Is the location within a defined redevelopment opportunity area (i.e. Policy WA10, the St Matthews Quarter Redevelopment Opportunity)?
- Would the proposed Market location adversely impact on the role of the PSA or redevelopment potential in a way that would harm the wider town centre retail role?

The GVA 2012 Study includes a summary table which indicates how each location scored against these criteria (See Appendix A).

The study also identified secondary location requirements, associated with the practicalities of each location as follows:

- Capable of delivering key existing strengths, including width and depth of offer, as well as multi-themed/multi-trader pitches;
- Deliver more critical mass;
- Not impeding retailers windows;
- Relevant in terms of existing uses and those of its neighbours;
- Affordable and deliverable; and
- Sustainability.

3.3 The preferred location

The Study concluded that The Bridge/Bradford Place/Digbeth scored the highest against the location requirements.

This review provides an updated assessment of the preferred location against the updated location requirements. Instrumental to this updated assessment is a review of the assessment criteria/location requirements.

4 Review of existing market and preferred location

This chapter provides a review of the current market location, the preferred location and the wider context in order to identify objectives for the new market. The following have been considered:

- Economic context;
- Public realm;
- Accessibility;
- Successful markets elsewhere;
- Exclusion Zone;
- Viability;
- Civil infrastructure; and
- Planning policy.

4.1 Economic context

The updated PROMIS Report (2013)¹ indicates that the retail performance of the town centre has reduced since 2009. Levels of employment have fallen (3.5%), retail vacancy rates have increased (from 22% to 26%) and yields have increased (by 0.5%).

The town centre is threatened by supermarket dominance and large, edge of town retail units such as those located on the Crown Wharf Shopping Park and Tesco. An example of this includes the relocation of River Island from the town centre to the Crown Wharf Shopping Park.

In addition, online retailing, which was in its infancy in 2009, is now a major part of our shopping habits. The British Retail Consortium (BRC) recently reported (January 2014) that there has been a 19.2% increase in internet purchases in the year to December 2013 compared with the previous year. Over the same period, retail sales have risen overall by 0.4%.

However, the wider economic outlook has generally improved since 2009 and confidence is returning to the market. House prices are on the rise² and consumer spending has started to increase. Recent major retail investments in the town are evidence of this confidence. The redevelopment of the former Tesco Metro site in the centre of Walsall is due to commence in 2014 and includes a new Primark and Co-op store. The Norton and Proffitt scheme was recently consented, which will see the development of a new retail parade along Digbeth and Lower Hall Lane. These developments are located to the east of The Bridge and once fully developed will increase the level of movement between The Bridge and the Old Market Square.

¹ UK Property Market Information Services (PROMIS), industry standard reports on commercial sectors for 300 towns and cities.

² Land Registry, House Price Index 2013, www.landregistry.gov.uk

Although not yet fully evident, it is expected that the retail map of the town centre will change as a result of these developments. In particular, the retail offer to the east of The Bridge will be strengthened, which will be reinforced by Primark, the key anchor tenant and the new Co-op convenience store. This has the potential to raise the profile of the area to the east of the Bridge as a possible location for the Market.

Walsall Market plays a key role in the performance of the town centre. However it is critical that the performance of the Market is put into the context of the consumer spending of the town centre as a whole. This currently represents approximately 2% of the town's total spend³. It is therefore vital that not only does the new market design create its own destination, but compliments and enhances the existing and proposed retail units.

Economic objective:

- The market is a destination in its own right, but can also interact positively with the surrounding retail units.

4.2 Public realm

The quality and type of materials used within the public realm, sets the tone for the market and helps define and connect areas of the town centre. Careful use of materials can also highlight the existing architecture and heritage features of the area, resulting in a cohesive environment for people to shop within.

4.2.1 Street paving

It is possible to date the historic Walsall streetscape improvements by identifying the selection and colour of standard hard wearing block paving elements and the layout of furniture within the street space.

Gallery Square consists of a tarmac surface with evidence of past contrasting colouring and textures, now largely worn away.

Along Park Street from the Saddlers Shopping Centre it appears as if the retention of existing levels and the re-use of existing road gullies led the focus of the refurbishments when improvements were undertaken. Where old highway kerb lines were once present these have been replaced with drainage channels, and although the area has been pedestrianised for some time, at the heart of the refurbishment the trace of old highway infrastructure remains.

³ Walsall Market: Options Appraisal Final Report, November 2012, GVA and The Retail Group



Figure 2: Paving styles around the public realm, varying from high quality, but damaged natural stones, to more pragmatic manufactured blocks.

On The Bridge there is evidence that higher quality materials have been used, but these are limited and many are damaged from heavy vehicles passing over them. The ‘Podium’ has been built from similar materials; however the integrated fountain ‘The Source of Ingenuity’ has not operated for some time. Streets leading off The Bridge have been surfaced with standard hard wearing block paving (of varying colours) and tumbled Tegula paving (light grey). These have during their life time been patched with tarmacadam or re-laid.

From High Street towards St Matthew’s Church there is little evidence of quality surface materials; again mainly standard hard wearing block paving elements are prominent. On further inspection there are some old, worn setts and larger scale Yorkstone flags outside the Black Country Arms and Guildhall that offer a level of quality and character to this area of the street.

4.2.2 Buildings and facades

The renewal and enhancement of shop fronts are critical factors in shaping the appearances and character of shopping in the streets. The need to alter shop fronts varies with locations. Some are required to suit specific business purposes, others follow fashions and trends.

In response to these changes, shop frontages in Walsall have been altered over time, yet looking above these facades reveals the rich past of Walsall, some of which has been lost at street level. There are key buildings, WH Smith and Barclays Bank upper façade amongst others along Park Street that offer distinct visual interest, architectural detailing whilst providing key landmark and way finding elements.

On The Bridge the late 19th Century Lloyds Bank with its slate roof and sandstone façade overlooks the current market area. The façade to the Victorian Arcade is equally impressive, particularly on The Bridge; however the internal arcade with

its sky lights and shop facades is where the real value can be seen, offering a distinct character and quality of both architecture and independent retail outlets.



Figure 3: Building frontages throughout the public realm vary from high quality facades within The Bridge area, to lower quality and poorly integrated sites along High Street.

Further along Park Street the building quality reduces. Built during the 1960's the buildings are in some instances in very poor condition. Further up the street there are a number of key buildings, the Market Tavern (in need of extensive restoration), The Black Country Tavern the Guildhall, all with St Matthew's Church in clear view atop the hill.

On the upper portion of High Street is the entrance to ASDA which is the rear entrance to the store. The store interface with the street could be enhanced through the better integration of the paving materials and delineation of pedestrian routes. The imposing stairs and retaining walls could be softened through better use of the street levels or street furniture placement.

4.2.3 Street furniture, signage, street lighting and street art

Walsall Town Centre contains significant quantities of street furniture, particularly on Park Street and The Bridge. On Park Street there are a large number of telephone boxes in a relatively small area, along with litter bins, street advertising units, a children's roundabout and mobile food outlets. There are moveable planters with trees that define the edge to the old footway along with grey granite stone benches. All elements are free from vandalism and litter but are of a basic practical quality.

The street lighting, bollards and illuminating gateway features on the lower part of Park Street all form part of the same street furniture family. This offers some coherence to the street furniture palette, but elements will require refurbishment if

they were to be re-used. However, a more strategic approach to guiding pedestrian and preventing vehicular movements needs to be considered.

Street art on The Bridge reflects the traditional businesses that influenced Walsall during the industrial revolution. The 'Podium' and associated water fountain 'The Source of Ingenuity' echoes the manufacture of hand tools, whilst the bronze saddle on Bridge Street reflects the leather industry. Further street art elements include the much loved concrete 'Hippo' positioned in the heart of the market area.

Some of these elements need repairing and generally the number of public art items in Walsall are of good quality, but without any joined up strategy. Identifying each element and including them as part of a wider way finding strategy, whilst making them key landmark elements integrated into a walk through town may form part of an overall strategy that should be considered. As a result the streetscape often appears both chaotic and cluttered.

4.2.4 Planting

Trees are placed in both moveable and built-in planters on Park Street, but these are of lower quality and have limited benefit in their locations. There are examples of some valuable mature trees on Park Street, and semi mature trees on The Bridge and side streets. However, tree selection on The Bridge has resulted in Lime trees, *Tillia* (sp) dropping sticky substance on surrounding paving and market stall covers leaving unsightly and hard to clean surfaces.

Urban realm objectives:

- Develop a palette of suitable paving materials, street furniture and lighting elements that are robust and easy to clean with existing cleaning equipment.
- Move away from traces of highway infrastructure and make it a distinctly pedestrian environment.
- Form a positive relationship with the historic building frontages ensuring positive integration and activity with the High Street.
- Develop clear entrance and exit thresholds.
- Create a robust way finding strategy integrating with existing public art elements and land marks.
- Rationalise the amount of street furniture and signage elements.
- Develop a robust way finding strategy, integrating existing building and façade elements.
- As appropriate palette for tree and shrub planting that will have a positive impact and is easily maintainable.
- Ensure any planting is positioned in appropriate locations that allow flexibility as market expands and evolves.

4.3 Accessibility

4.3.1 Vehicular access

The current Traffic Regulation Orders (TROs) restrict general public vehicle access to hours outside of 10am and 5pm. The aim of this is to ensure the pedestrianised area is not subject to traffic during the peak hours of the day. This also has a consequence of limiting market trader access for loading and unloading. This was highlighted as an existing issue by traders at the traders meeting on 26th November 2013, especially during winter months when trade drops off dramatically after the hours of darkness, but traders are unable to leave.

On market days it is reasonable to assume that vehicle movements would be restricted. However vehicles regularly exit the loading space to the rear of the Sister Dora Buildings through the pedestrian zone towards Lower Hall Lane. It is understood that as the current TRO allows disabled access for parking, there is no physical barrier to traffic, allowing this abuse of the TRO's to take place.

It is also understood that amongst the various loading requirements for the area, that large articulated heavy goods vehicles access Park St each evening, exiting via Bradford Street onto Bradford Place. These vehicle movements must be retained in any new scheme or alternative routes found, to ensure the retailers can continue to trade.

Accessibility objective:

- It will be necessary to ensure emergency vehicles have access on market days but restrictions will need to be defined and enforced on private vehicles which will influence the wider market day strategy.

4.4 Recognising best practice

4.4.1 Successful markets elsewhere

Successful markets throughout the UK have been reviewed and are described in detail in the following sections. The current market has been critically reviewed in light of best practice at these markets elsewhere.

In recent years the national industry organisations i.e. The National Association of British Market Authorities (NABMA) and The National Market Traders Federation (NMTF) have been rewarding excellence in markets through National Awards.

Extract from the Department of Communities and Local Government (CLG) Report Retail Markets Management Models⁴:

“One of the key issues that has been identified as crucial to the viability and success of the market is the way in which the market itself is managed.”

⁴ Retail Markets: Management Models, 13 September 2010, Department for Communities and Local Government

The CLG Committee published the report of its inquiry into traditional retail markets⁵ in 2009 and amongst its recommendations were:

“We do not underestimate the challenge facing local authorities seeking to sustain their markets in the current austere climate. From the evidence we have received, it seems to us that there are two big challenges: finance and management.”

“We recommend that councils review their market management structure and give careful consideration to the most appropriate organisation for them that recognises the need to realise the wider economic and non-economic benefits of markets and gives weight to public and private sector alternatives.”

The report also identified the following ‘qualities’ that make a successful market:

- Integration with the town centre and local communities
- Good management.
- Investment.
- Promotion.
- Unique selling point.
- Location.
- Partnership working.
- Size.

When you consider some of the UK’s most successful markets such as Bristol, Bolton, Bury, and Leicester high standards of experienced management are very apparent and this is one of the key elements for the future of markets in Walsall.

What is interesting is that both Bristol St Nicholas Market and Bolton’s Market Hall and Open Market are located on the periphery of the retail core but have such a strong reputation as food markets they thrive. Bury Market has always been the heart of the Town’s retail area.

One of the main points of recent national reports is that the regeneration of markets need to be food led and certainly the Indoor Markets at Bristol, Bolton and Bury have managed to maintain a very high percentage of good quality, value for money, fresh food stalls.

Some examples of best practise at other markets which are capable of being transferred to Walsall can be found at Leicester, Bury and Bilston.

London Borough of Bromley

The Local Authority operates one town centre street market accommodating approx. 50 stalls. A smaller poorly located market was moved to extend the new market along the High Street. The street market enjoys a prime town centre location on the main retail High Street. The traders are required to maintain high

⁵ Select Committee Inquiry into Traditional Retail Markets, 23rd July 2009, Communities and Local Government Committee.

standards of display and customer relations. The stalls on this market are floor fixed pop up stalls and are erected at the start of the day and removed at the end of the trading day.

The market has significantly improved since its location on the High Street both in appearance and in size with increased demand for stalls resulting in additional market days. One of the main reasons for its success has been improved Management and again this has resulted in the Market winning a national industry Award in 2013.



Figure 4: Bromley market scenes.

White Cross Street, Islington

The old street market was no more than a collection of ramshackle structures and barrows and was not fit for purpose in what was an up and coming area of London.

Whitecross Street Market is one of the oldest markets in London, having operated for over 150 years. It is located between Old Street and Fortune Street and has benefited from major investment from Islington Council, EC1 New Deal, City of London and English Heritage.

The old stalls were replaced by pop up mini marquees of a high standard colour and design, the product offer was improved and the market is now thriving and the diversity and market offer has improved considerably in the last 2 years.

In addition to the daily general market, a specialist food market runs every Thursday and Friday, with up to 50 producers selling a range of locally sourced mouthwatering food and drink and is very popular with local office workers at lunchtimes. All types of goods and foods are sold within the market.



Figure 5: Islington market

Worthing

The run down Local Authority market was moved from a poor location on a Pedestrian Square away from the main shopping area to the High Street and the Council took the decision to outsource the management function at that time. As part of the contract the new private operator was required to provide new pop up stalls which are put up and taken down on the Wednesday market day.

The Market consists of 75 Mini marquee type stalls which are erected each day of the market. It is located on the main pedestrianised shopping street which is quite narrow in parts. The hugely popular seaside market town is usually well supported with around 75-80% occupancy out of the summer season but has the ability to expand to take on the additional seasonal demand for stalls.

Extract from the Department of Communities and Local Government Report Retail Markets Management Models:

“The Worthing Town Centre Initiative is a community interest company with an objective to enhance Worthing and to provide a vibrant and exciting town centre. Its aims include increasing footfall and helping to ensure that the businesses that choose to trade in Worthing are successful.

The town centre partnership’s aim was to use a rejuvenated market as a catalyst to bring Wednesdays back to life in the town, increase footfall and allow the market to become a feature of the shopping week. This would also have a spin-off benefit for the shops within the town to increase their custom.

Following a tendering process, Town & Country Markets were selected to develop the market. Working in partnership with Worthing Town Centre Initiative, the private market operator introduced a new Wednesday market near the sea-front area of the town.

Before the market moved into Montague Street, Wednesday was the quietest trading day of the week with an average of 11,000 shoppers; since the market started there has been an increase to an average of 18,000 shoppers each Wednesday making it the second busiest day of the week in terms of footfall.”



Figure 6: Worthing typical market stall

Newark

Although it is a relatively small market town Newark has a large, very popular outdoor market on the main Town Square a flexible event space accommodating around 100 stalls. The council invested significantly in providing a large number of pop up mini marquees

Currently the Market trades five days a week; with general markets on Wednesday, Friday and Saturday and Collectors/Antiques markets on Monday and Thursday. On the first Wednesday of every month it operates a very popular Farmers Market offering high quality local produce.



Figure 7: Newark market stall types

Sheffield

In November 2013 the local authority opened a new £4.5m Market Hall in one of the main shopping streets - The Moor - in the City Centre. The Market Hall consists of some 147 stalls being occupied as some 98 trading units mostly held on awaiting further information on this. The open market consisting of 60 or so permanently fixed, pop up mini marquees is situated along the street immediately

outside the Market Hall These stalls are permanently fixed to the floor and remain in situ even on non-market days. .



Figure 8: Sheffield market works.

Hereford

Hereford Open Market moved in 2008/09 from its historic location in the Cattle Market to a prime location on the High Street, due to a continuous decline over a number of years. Whilst there were strong protests by traders regarding the use of Pop Up Mini Marquees the introduction of specialist markets within the centre demonstrated that a demountable market using this type of equipment could work in the town centre. The Council purchased the new stalls and the market has developed and grown into a very positive asset amongst the central retail offer.

There is approximately 48 to 50 mini marquee pop up type stalls operating two days each week. The market is usually full and space permitting they are confident they could almost double the size of the market as demand for a stall is high. The market is so successful the Council are considering opening the market for a third day (Friday).



Figure 9: Hereford street market

Darlington

In 2008 the Local Authority moved the outer market from a site at the rear of the Market Hall onto the High Street.

Active participation by market traders in the consultation process for a major development scheme to transform the town centre resulted in the re-alignment of the outdoor markets, ensuring they were at the heart of the town centre.

The markets actively participate in the partnership on a range of issues such as transport, safety and events, and contribute to the action plan. There is improved communication between the markets and major retailers in the town.

The town centre board recently commissioned a report into the covered market, which in addition to identifying shopper profiles showed a satisfaction rating of 63%⁶.

There were strong protests from the traders regarding the use of pop up stalls but the Local Authority held firm and the market is now still thriving.



Figure 10: Darlington market

Leicester

The multi award winning Leicester market is in the top bracket of U.K. markets and is currently undergoing a £7m. redevelopment. This is indicative of the Local Authority's regular injection of capital spend in order to keep the market moving forward.

The Local Authority rightly believes that a high quality, diverse food offer is the main driver for attracting customers and as part of the re-development they are building a purpose built Food Hall.

Some of the innovations of recent time include the siting of a permanently manned Customer Services desk on the Outer Market, the introduction of a Shoppers Charter, a "best buy" seasonal food stuffs guide, a Continental Cafe to increase dwell time and a traders discount rent scheme, The market is so successful with occupancy rates in the high 90% range that it is now in a position

⁶ Extract from the Communities and Local Government Report Retail Markets A Good Practice Guide – September 2010

whereby they can refuse applications for stalls from traders wishing to sell items which the L.A. deem to be already well represented on the market.

Bury

The multi award winning Bury market is also in the top bracket of U.K. markets It is ideally situated at the very centre of the town and enjoys occupancy levels in the high 90% range. The market has a wide and eclectic range of good quality merchandise and an especially good food offer.

Bury market is aggressively promoted far and wide as “Bury’s World Famous Market” and is the cornerstone of the fully integrated Bury Town Centre promotional activities. The market offers free coach parking, market DVD’s, maps, car stickers and other literature. In 2013 Bury attracted some 1,400 coaches to the town using the market “hook” to attract coach operators.

Bury Market also accommodates the local Citizens Advice Bureau on site and this facility is particularly useful to the stereotypical C2.D.E socio- economic clientele who most use the market.

Bilston

Bilston, unlike Leicester and Bury who promote their market on a more regional basis, sees itself as a more community based market and targets that customer base accordingly in the provision of a considerable number of stalls selling inexpensive goods.

It has enjoyed frequent injections of capital investment in the past few years with the provision of new office facilities, public toilets, Market Hall air conditioning and crèche facilities. The regular upgrade of facilities has enabled the market to avoid the trap of lower priced goods being sold in a poor environment.

The market is well integrated in the overall town offer. It has bus stops and the Metro Interchange on its’ doorstep and it also provides free parking.

On all 3 markets the key common factor is that they all enjoy good pro-active management and support from their Local Authority.

The NMTF have, in collaboration with a retail sales specialist, produced a very useful video called “NMTF 400”⁷ which shows 400 very inexpensive improvements that can be made to enhance and improve stall displays. Although the video is aimed primarily at market hall traders many of the tips would be of great use in an outer market setting.

Given the constraints placed upon it as being part of, and subject to, Local Authority practices and procedures, it is accepted that proactive management in areas such as product offer and display of goods may be difficult to achieve by in-house management. However, it is considered to be critical to the success of the new market that such proactive management is carried out wherever required and this issue needs to be fully appreciated by all sides.

⁷ NMTF 400, www.nmtf.co.uk/start-up/retail-training

4.4.2 What does this mean for Walsall Market

The current, permanently fixed, tubular metal, traditional stalls appear outdated. It is envisaged that in the new market layout that this type of stall could be replaced with modern, pop up mini marquee style stalls. There are numerous manufacturers and suppliers of such stalls and standard commercially available sizes are 3m deep and multiples of 3m wide. Examples are CityB Marquees and Vitabri.

The stall covering material should be fire proof to British Standard 7837 standard and it can be of virtually any colour or combination of colours depending upon the desired overall appearance of the market. This also provides a branding opportunity for the market which could incorporate the Walsall Council logo. The easily removable side and back sheets could be made of a transparent material to enhance visibility through the market and could have “windows”.

In order to generate some degree of uniformity to the layout whilst still retaining flexibility in future stall allocations it is proposed that all the stalls be 3m in frontage. Regard should be given to the cost differential between the sizes of unit costs (e.g. CityB Marquees prices are 3m = £795.00, 4.5m = £1050.00 and 6m = £1300.00 making a 6m unit made up of 2m x 3m 25% more expensive than purchasing a 6m unit). Traders that require more than a 3m frontage would be required to occupy two or more stalls which can be joined using a special guttering system. This will also need to be reflected in the proposed number of ground fixings.

In order to avoid the necessity for heavy weights to weigh down the stall it is also proposed that the stalls be provided with flush fitting floor fixings. When not in use the stall could easily be removed with no trip hazards being left in place. However it is also advisable that some weights be acquired to allow the units to be used for other events in alternative locations where there are no ground fixings.

Traders would have to provide their own counters and decide if they want a full counter frontage, part frontage or to have a walk in stall with the counters at the back and sides.

There is a view that the stalls are not as robust in extreme weather conditions and traders will not be able to clamp heavy display bars to the unit. Such objections should be rebutted. The more imaginative types of display necessitated by the pop up stalls, some with full counters, some with walk in units adds to the overall appearance of the market. Based on an assessment of pop-up stalls already in operation, we would expect these to have a lifetime of around six years if they are to be dismantled twice a week.

Industry guidance⁸ is that the framework, if used and maintained correctly and in accordance with manufacturer’s recommendations will last around six years with canopies and covers lasting approx. 4-5yrs. Discussion with operator of such stall types, including Sheffield Market, have indicated that these statements are proving to be accurate, with the main frames and canopy elements withstanding the elements long term when left in place for extended periods of time.

One of the critical issues in purchasing this kind of mini pop up marquees is that the each of the component parts is easily replaceable. It is unusual that the whole

⁸ CityB Marquees, www.citybgroup.com

frame wears at the same rate and the designs which have replaceable sections are much better and will extend the life expectancy of the stall.

There are many examples throughout the country where the introduction of pop up stalls has been successfully carried out as indicated below.

Best practice objectives:

Pop up style stalls that are 3m deep including working and access space with a 3m wide public frontage.

4.4.3 Moving the market indoors

In our experience, we are not aware of any examples where an operational outdoor market has relocated to an indoor venue. There are some examples of indoor markets relocating to new indoor venues. An old indoor market in Sheffield was relocated across to the other side of the City to a new state of the art Market Hall at a cost of £4.6m. The new Market Hall consists of some 147 stalls being occupied by 98 traders.

Leicester Market is currently undergoing a major £7m redevelopment, which includes the demolition of the Market Hall and the construction of a new Food Hall. The old Market Hall consisted of some 147 stalls and was occupied by 100 traders. The non-food traders are being re-located onto either the adjacent Outer Market or into nearby vacant retail premises, whilst the eight food traders are being re-located into the new Food Hall. The cost of the new Food Hall is approximately £2.5m.

At Market Harborough the existing indoor market is being re-furbished at a cost of £800,000 and the traders have moved to a temporary prime town centre location operating out of wooden chalet type units before moving traders back into a refurbished and restyled Market hall.

Many of the traders having experienced a much better location, albeit a semi open market environment, are reluctant to move back into a market hall in a much poorer location. Bolton is another example of where the council have committed to a £4m refurbishment and restyling of its Indoor Market and Food Hall where traders have been temporarily relocated to the open market. Likewise many traders having tasted the open market experience are considering staying on the open market area. However the attributes of an indoor market are very different to an outdoor market.

What are the key differences between indoor and outdoor markets?

1. Occupation agreements – Outdoor markets are typically operated on short term licence agreements ranging from daily to weekly licenses. These can be terminated on days or weeks' notice. Typical stall charges are £30-£50 per day.
2. Indoor market stalls are typically let on tenancy agreements or lease arrangements usually around 3-5 years in length. Traders are required to open

for business each day of the week. Rents for towns comparable to Walsall are typically around £400 per week

3. The cost and level of commitment required means that traders need to be confident that their business can be viable in such a location. This often means that many of the smaller outdoor traders are priced out of an indoor market.
4. Trader costs – often being located within an indoor market, where the overall quality of traders is higher will require traders to invest more in equipment such as scales, tills, display equipment – shelving, display stands, refrigerated equipment, debit card payments and quality of equipment (eg. food and beverage equipment. This additional cost can also price out certain traders.
5. Fit out costs – One further consideration is the cost to the Council/private operator required to fit out the internal accommodation for a market. Such costs will include providing for services, drainage, access for loading, refuse collection etc. This capital cost should not be underestimated. Basic Capital fit out costs for the operator would include such things as:
 - Stall structures/modules which can be easily altered to offer flexibility - double, treble, back to back usage
 - Shutters
 - The electrical costs of both communal and stall lighting
 - Fire Alarms and Sprinkler systems
 - Non slip flooring
 - Refuse removal is usually much more mechanised
 - Drainage for food stalls
 - Water supplies
 - Public and Trader Toilet Provision
 - Storage facilities and Food Preparation areas
 - Loading and Unloading Areas/Facilities

The Valuation Officer has since 1995 held that businesses within indoor markets should be classed as individual hereditaments and therefore rated individually. A test case was held involving The Valuation Officer, Manchester City Council and traders from the Arndale Market in Manchester. The outcome of the Valuation Court was agreement with the Valuation Officer that businesses on Indoor Markets should be individually assessed.

Historically the Indoor market/Market Hall rated as one hereditament would apportion out the rates as an element of the rental charge for each stall and in almost all cases this was never itemised within the rents charged. The impact of individual assessments on Indoor markets has meant a very significant increase in cost to the individual traders. Open markets businesses are not rated individually and therefore remain a much more cost effective and less tying form of market trading.

For an indoor market of circa 70 stalls capital costs could be in the order of £1.5 - £2m

Whilst it is very difficult, if not impossible, to meaningfully compare the rental cost for a unit in a Market Hall to that of a stall on an Outer Market on a like for like basis it is, for the reasons listed above, a fact that a unit in a Market Hall will inevitably be more expensive than a similar sized stall on an Outer Market. Elsewhere in the Report it is proposed that a 3metre. unit for non-food goods should be £30-£50 per day thereby on a 6 day per week basis it would be at least £180 per week.

Indoor Market rents are difficult to compare on a like for like basis from town to town due to a number of varying factors such as the rating basis of the market, payment or otherwise of a service charge, responsibility for gas/electric/water payment and other similar issues. However, it is not unreasonable to expect that a 3 metre. unit in a 6 day Market Hall would attract combined charges of some £400 + per week.

The consequences of these issues are that the costs to operate within an indoor market become comparable to operating in a secondary retail unit within the town. It is this sector that has experienced an increase in the level of vacant retail premises as a result of the economic factors outlined in the PROMIS report findings below.

There are therefore genuine risks associated with relocating to an indoor market. These are :-

- The extra costs and commitment required by traders that already operate within very tight margins.
- The capital cost to the Council to fit out the space before any occupational costs are considered.
- The level of demand from potential occupiers of indoor stalls given the availability of existing vacant retail units within the town centre.
- The diminishing trader demand for indoor markets.

4.5 Exclusion Zone

The Exclusion Zone is a legally defined area in which the market cannot be located in order to ensure the successful regeneration of the town centre. It is located immediately adjacent to the frontage of the new Primark development site, covering parts of Digbeth and The Bridge. This zone has been established with Zurich Assurance Ltd the developer of this site, and precludes the siting of any market stalls within it. Improvements to the public realm are however permitted.

4.6 Viability

4.6.1 2009 PROMIS Report

In order to assess the vitality and viability of the town centre GVA included the findings of a 2009 PROMIS Report within the document. It highlighted the following key considerations:

- Walsall was one of the least affluent areas of the 200 PROMIS towns assessed (ranked 175 out of 200, where one is the highest).
- The shopping population of 209,000 is expected to decline.
- The total retail floor space is 133,000m².
- The range and quality of occupiers is below the average for comparable PROMIS towns.

4.6.2 2013 PROMIS Report

An updated PROMIS Report has been reviewed, with a summary of the key points below, which draws out the comparisons from 2009 to 2013:

- Walsall remains one of the least affluent areas of the PROMIS towns. As predicted, the shopping population did decline from 209,000 to 183,000.
- The amount of retail floor space has remained the same.
- The range and quality of occupiers continues to be below average.
- Since 2009 employment levels have reduced by 3.5%.
- Shop vacancy rates are up from 22% to 26%.
- Rental values have reduced by 12.5%.
- Yields have increased by 0.5%.

4.6.3 Soft Market Discussions

As part of our reviewing work undertaken to date, we have also undertaken soft market testing with key retail stakeholders within the town. A summary of our findings is as follows.

Table 1: Soft market discussions summary

| Name | Comments |
|--|---|
| Wright Silverwood on behalf of Topland – Owners of the Saddler’s Shopping Centre | Letting retail units within the Centre continues to prove difficult, particularly with high levels of service charges. Deals are being secured at below market rents or merely to cover high service charge rates. Topland continue to be dissatisfied with the presence of the market stalls along Bradford Street that are believed to obscure shop frontage. |
| St Modwen – Joint venture partners in the Norton & Proffitt site | Keen to see a quality well managed market. Remain concerned that consolidation of the Market at The Bridge will create a barrier to eastward pedestrian |

| | |
|---|---|
| | movement. Suggest a small quality street food offer on the Bridge and the other mixed stalls set around the Old Market Square. |
| Threadneedle/DTZ – owners of the Old Square Shopping Centre | The Market needs to be a destination – not scattered around the town. Stalls along Digbeth currently obstruct key views from Park Street down to Debenhams. The Bridge is a junction and needs space for people to linger and plan walking routes to shops. Overcrowding this area will stifle this movement. |

In our discussions, there is recognition that the Market is an important attribute of the town. Indeed Topland and Threadneedle have both suggested locations within their development schemes for the relocation of the market. Topland has proposed that the current 3,250m² Argos units could be converted into new indoor market at the southern end of the Saddler’s Centre fronting Bradford Street, if the current Argos lease is not renewed in late 2014.

Threadneedle has prepared a scheme as part of the refurbishment and extension of the Old Square Shopping Centre. It shows a 1,670m² indoor market adjoining Debenhams located to the rear of the centre with access from Bridge Street. These locations are considered in our analysis.

Feedback is also being obtained from the market traders, retail occupiers and the general public as part of the public consultation process. This will be considered as part of this evidence base, once these consultation processes are complete.

4.6.4 GVA Cost Estimates and Financial Assessment

The GVA financial analysis for the proposed new market is very high level. The stall pricing of £30.00 to £50.00 appears to be suitable, however the analysis assumes there is 100% occupancy six days per week. This assumption is not considered realistic. Consequently, the quoted potential profit of £500,000 per annum should be reviewed. The GVA study expenditure figures also make general assumptions regarding management and staffing costs. On-going management costs also need to be considered further.

4.6.5 Market Occupancy Figures

Schedules of occupancy levels have been provided, together with income and expenditure schedules at Walsall Market. The market has, in terms of occupancy levels, been in steady decline for a number of years and the decline is reflected in the occupancy levels on all five days of operation. In summary, the current market has around 100 stalls the occupancy figures show that some 39 stalls are regularly unoccupied.

All of the stalls are unsightly on non-market days and unoccupied stalls are unattractive during the market days and should be avoided. *“No one sees a half full market – they only see a half empty one”* is an old market saying which still holds true today. To appear busy and thriving the market needs to be fully occupied with all stalls being used.

The occupancy levels for the busier market days of Monday, Tuesday, Friday and Saturday are all remarkably similar and are showing a reduction from between 80

to 86 permanent traders in 2012/13 down to 69 to 71 permanent traders at the present time (February 2014).

The occupancy levels for the quieter Wednesday market show a similar reduction over the same period from 67 permanent traders down to 53 permanent traders.

Comparable, meaningful statistical data on either a regional or national basis is notoriously difficult to obtain within the market industry. The NABMA have over the last 20 years tried to set up benchmarking groups but all have failed due to lack of input from the market operator members. The last attempt ended some seven years ago and none has taken place since.

An extract from the First National Survey of Retail Market's – The Rhodes Report 2004⁹:

“Despite General Markets appearing to be expanding, offering more days and more stalls, there is an alarming fall in stall occupancy rates. These rates from 1998/99 (79.01%), 2000/01 (77.25%) through to 2003/04 (75.4%) demonstrates a steady decline. If these markets are not carefully managed and investment not made available, then a realistic forecast of stall occupancy rates for 2008/09 could be around 70%. This downward trend should be a cause of great concern to all stakeholders.”

Markets which are operated for five, six or seven days a week seem to have higher occupancy rates than those operating one to four days a week.

2003/04 levels (%):

- 1 day per week 73.31
- 2 day per week 73.61
- 3 day per week 75.82
- 4 day per week 72.12
- 5 day per week 78.83
- 6 day per week 81.72
- 7 day per week 79.80

In our discussions with other market operators and through our own experiences, this trend is continuing today. Our wider analysis indicates that Walsall is very much following national trends of decline in terms of occupancy rates. This is largely due to the competition from discount stores such as Aldi and Lidl, as well as internet and superstores.

In our investigations, we have not been able to find an Authority reporting occupancy levels which are even being maintained, yet alone on the increase, and to this end the decline in occupancy levels at Walsall appears to be in line with national trends. This on-going rate of decline on the present site may be seen as a cause for some concern in that it is considered that The Bridge area is the preferred site of the new market.

⁹ The Rhodes Report (TRR), 2004, Rhodes Capital Management.

The reported income for 2012/13 is £608,347 for Walsall Market against an expenditure of £357,433 giving a profit of £265,784.

Walsall Council wish to retain in-house management of the service and it can therefore be anticipated that the expenditure levels will remain fairly constant and in order to maintain the profit levels it will obviously require income levels to also remain constant.

If the new market were to consist of 70 stalls with 60 general goods stalls at £35 per day and ten food and beverage units at £50 per day – the income on present trading days and assuming full letting would be in the region of £657,800 per annum. Clearly 100% stall-letting will not be achievable but given the additional circa £50,000 income outlined above over and above the 2012/13 levels any reduction in stall lettings will still generate similar income levels, and therefore profit, as are currently being achieved.

Assuming 90% occupancy over a 12 month period and taking into account additional operational costs for assembly and dismantling of the pop up stalls, we can reasonable expect the income and expenditure to be as follows:-

Table 2: Popup stall income and expenditure

| Potential Annual Income (assuming 5 days per week) | |
|---|----------|
| 60 stalls x £35 | £546,000 |
| 10 stalls x £50 | £130,000 |
| Total (gross) | £676,000 |
| Total (90% occupancy) | £608,400 |
| Expenditure (as 2012/13) | £266,000 |
| Plus pop-up management costs | £16,000 |
| Total expenditure | £282,000 |
| Net Profit | £326,400 |

The indicative table above does not include the potential opportunity to expand on the number of stalls for special events and themed markets.

In view of the above, we are therefore of the opinion that the new market should consist of approximately 70 stalls in a revised layout with new style stalls. We are of the opinion that such levels will provide a critical mass sufficient to make the market a viable, sustainable proposition. However, there should also be scope to allow expansion of the market for special events and themed markets.

4.6.6 Market offer

The current stall structures are outdated and in poor condition, with the overall standard of stall display and the range of goods on offer at Walsall market, with only a few notable exceptions, considered to be poor. It will be necessary to ensure that traders on the new market 'up their game' in terms of display and the Local Authority will need to be proactive and innovative in attracting a higher quality and diverse range of goods, especially in respect of the food offer.

Viability objectives:

- The location of the Market must be considered in the context of the total retail offer of the town centre. Although the market is an important asset to the town, the total spend is 2% of the overall total.
- The introduction of modern, robust demountable trading equipment including Pop Up Mini Marquees, Continental umbrellas, bespoke trailer units, transportable refrigeration units etc. has allowed a much more flexible approach to setting up markets and enable markets to be set up in a short period of time in locations within town and city centres. is an old market saying which still holds true today. To appear busy and thriving the market needs to be fully occupied with all stalls being used which can be achieved each day by only erecting the requisite number of trading units to meet demand – alleviating empty units. The current market therefore operates with about 70 or so stalls being occupied and this clearly provides sufficient mass to retain the drawing power of the market.
- The new market should consist of approximately 70 stalls, in a new layout (with potential for expansion and contraction) with new demountable stalls and an improved offer in terms of both display and product mix. Emphasis must be on increasing the fresh food offer.

4.7 Civil works and infrastructure

4.7.1 Underground utilities

Underground utilities can be the cause of considerable constraint to works above ground. It is evident from the site visit that there are numerous utilities present as would be expected in such a location. Statutory authority utility records inform what is necessary for the provision of any future connections required by the market stalls.

The area around the fountain needs specific attention, as various pumps, tanks, water and electrical feeds are present, that need to be fully understood in the event of the fountain being removed.

4.7.2 Surface drainage

The site currently has a wide variety of drainage media present, ranging from gullies to channels. These are largely located along former kerb lines in accordance with the previous highway use of the area as described in the street paving section. The new public realm will make use of the existing underground drainage system, but may feature new at-grade collection systems.

Past drainage surveys have indicated incorrectly connected foul and storm sewers in adjacent streets, leading to unpleasant smells in the area. A large brick arch culvert runs are extremely shallow depth in The Bridge area, restricting both over ground loading and depth for any foundations.

4.7.3 Revenue producing street furniture

As previously noted, there are multiple features within the streetscape that restrict layouts and have limited potential for relocation. It is understood that these generally provide revenue to Walsall Council and that their removal would not be favourably received, nor be consistent with the desired programme for the works.

4.7.4 Pavement type and makeup

The pavement is critical to the success of any public realm scheme. The surface layer must be selected to not only offer the aesthetic characteristic required, but also be of sufficient durability and strength for the intended use. The Market area will require a surface that can be easily cleaned and will not show stains and discolouration from market stall activities.

The substructure for the pavement is understood to vary throughout the area, with some parts currently not capable of accepting emergency service vehicle loadings. Discussions with Walsall Council highways department have identified where these areas are, commonly adjacent to the buildings frontages where footpath areas would originally have existed. The maintenance vehicles, such as cherry pickers used in this area, and their loadings will be defined in the final works.

4.7.5 Storage needs

4.7.5.1 Stall storage

It will be necessary to provide storage for the new pop up stalls. Elsewhere in the report it is recommended that the new market should comprise around 70 stalls and that a further supply is purchased for additional and/or temporary use elsewhere. The storage requirements for 80 stalls will be approximately 35m².

The location should be nearby and on the ground floor for ease of manual handling by a trolley or cart. If such a nearby location is not available it would be necessary to increase the size of the store facility to accommodate both any transportation needs such as a vehicle and trailer and the operating costs to cover such additional needs.

4.7.5.2 Trader storage

The existing market storage facilities are located on future private land and are in poor conditions offering an unsafe environment. There are currently 13 permanent units ranging in size from 7.5m² to 15m² giving a total of approximately 130m² of storage, including refrigeration equipment. New storage facilities maybe required as part of the scheme. The volume of storage required, and any specific requirements of this such as refrigeration must be agreed with the Council.

It is unusual in the U.K. for a town to have a 5 day per week Outer Market whilst not also having a Market Hall. The existence of a nearby Market Hall, such as at Doncaster, Leicester and Birmingham, regularly gives the ability to provide storage facility to Outer Market traders in basement areas, outbuildings or specially constructed cages, often located at first floor level or again in basement areas such as Market Harborough and Wakefield.

In Walsall a relatively small number of the current Outer Market traders have temporary storage in containers located nearby at the back of Lower Hall Lane. The use of this facility should be continued on the same terms and conditions as at present until such time as the site is required for alternative use and/or development.

At such time as this facility becomes unavailable efforts should be made to provide alternative storage for those affected. Such alternative storage should be nearby but the provision of any new facility will raise issues in respect of a number of matters including the capital and revenue cost implications to both the L.A. and subsequently to the traders of such a facility.

Storage for the Outer Market traders is considered to be desirable but not essential. In Sheffield even though the 5 days per week Outer Market is situated immediately outside the Market Hall, the Local Authority do not provide any storage facilities for the Outer Market traders.

Civil infrastructure objectives:

- Avoidance of disruption to buried utilities specifically the storm culvert in the Bridge area.
- Routing of emergency vehicles into areas with adequate pavement foundation strength
- New storage facilities maybe required as part of the scheme.

4.8 Planning and regeneration context

4.8.1 Planning policy

The proposed market development should be made in accordance with the Development Plan, unless material considerations indicate otherwise. It is therefore important that the planning policy context informs the location criteria and is reviewed in regard to the current market and preferred option.

The Development Plan for Walsall consists of:

- Black Country Core Strategy (2011);
- Walsall Unitary Development Plan (UDP) (2005) (saved policies); and
- UDP proposals maps and district centre maps.

The following emerging policies will form a material consideration to the application. The weight afforded to the emerging policies reflects their stage in the preparation process, the more advanced in preparation the greater the weight may be given:

- Walsall Site Allocations Development Plan Document; and
- Walsall Town Centre Area Action Plan (AAP).

The proposals should also take account of the following supplementary planning documents:

- Urban Open Space (2006); and
- Designing Walsall (2007).

Particularly relevant policies from these documents are summarised in table 3.

Table 3: Summary of relevant local planning policy

| Policy reference | Policy summary |
|--|---|
| Black Country Core Strategy Policy CSP4 Place Making | Development will be required to demonstrate a clear understanding of the historic character and local distinctiveness of the area and show how proposals make a positive contribution to place-making and environmental improvement. |
| Black Country Core Strategy Policy ENV3 – Design Quality | Development proposals will deliver a successful urban renaissance through high quality design that stimulates economic, social and environmental benefits. |
| Black Country Core Strategy Policy CEN3 Growth in the Strategic Centre | The Strategic Centres (including Walsall) will seek to secure an appropriate share of comparison and convenience retail and office development in order to ensure that investment to regenerate the Black Country will not be lost. |
| UDP Policy S3 Integration of Development into Centre | To ensure the proper integration of developments in or on the edge of centres, proposals should be of scale and nature appropriate to the size and function of the centre concerned. Development should be sensitively integrated, in functional and visual terms, with the primary shopping area and other land uses, pedestrian routes, car parking provision, public transport facilities, servicing arrangements, traffic circulation, and the local townscape. |
| UDP Policy WA1: Primary Shopping Area | The policy states that “new retail floor space will be concentrated within and adjacent to this area. Redevelopment schemes for the Digbeth area will be particularly encouraged. Retail schemes will only be permitted away from this primary shopping area where it can be demonstrated that there are no suitable development sites or vacant premises within or immediately adjacent to it.” |
| UDP WA2: The Market | The Council recognises the importance of the market as an attraction for visitors and the significant role it plays in meeting the needs of the local community. Where necessary, the Council will carry out improvements to the operation and setting of the market, to maintain and increase its attractiveness. |
| UDP Policy WA7: Development/Investment Opportunities | The policy lists six sites or areas within which there is significant development/regeneration potential. These include: Hatherton Street/Littleton Street/Albert Street In town Lower Hall Lane/Digbeth/Old Square Upper Rushall Street/Ablewell Street/The Ditch Town Wharf Littleton Street West/Wisemore/Garden Street/Portland Street Development proposals within these areas/sites must conform to the principals set out in Policies WAL8-WAL13. |
| Walsall Town Area Action Plan – Issues and Options for Walsall Town Centre | The Issues and Options document defines the Primary Shopping Area and other opportunity areas including, Walsall Gigaport, Walsall Waterfront, Park Street area and the St Matthew’s Quarter. In addition it identifies secondary development opportunities. |

4.8.2 Nearby developments

There are a number of major development that once complete will significantly transform areas of the town centre. It is therefore important that the setting of these developments is taken into account in regard to how the market could function alongside the new uses.

- Old Square Shopping Centre/Former Tesco Store/ Sister Dora Buildings – planning permission has been granted to Zurich Assurance Limited for new retail stores within the block bounded by Bridge Street and Digbeth. This would include a new Co-op store with a façade presence on Bridge Street and a new Primark Store with a façade presence on Digbeth. The third store would have a presence within the Old Square Shopping Centre. Service access is proposed off Bridge Street.
- 41-43 High Street, 10-30 Digbeth and 1-10 Lower House Lane Retail Parade – Norton and Proffitt Developments has been granted for the demolition of the existing retail parade along Digbeth and Lower Hall Lane, the decked car park accessed from Lower Hall Lane and ancillary workshop building from the former Shannon’s Mill site, to make way for a new retail parade.

Planning objectives:

- The new market should be located with the Primary Shopping Area as defined by the Walsall UDP and the Black Country Core Strategy.
- The new market should complement the major retail proposals at the former Tesco Store and Digbeth/Lower Hall Lane area.
- The new market should complement development opportunity areas identified in the UDP and the emerging AAP.

5 Revised market location criteria

A robust set of criteria are required to compare and assess potential locations for the market. We have reviewed the location requirements set out in the GVA and The Retail Group report (2012) (summarised in section 2.2). It is considered that a more detailed set of criteria are required that reflect the current market and context as set out in Section 3. The revised location criteria are listed below.

Table 4: Location criteria

| Location requirements | Explanation |
|---|---|
| Planning policy | |
| The market should be located within the Primary Shopping Area (PSA). | The PSA is defined in Policy WA1 of the Walsall UDP saved policies and the Black Country Core Strategy. |
| The market should be within a defined redevelopment opportunity area. | The new market should be located within a development/investment opportunity area as identified in Policy WA7 of the UDP. |
| The development should integrate positively with the surrounding uses. | The new market should accord with Policy S3 of the UDP Integration of Development into Centre. |
| Urban realm | |
| Does the market contribute positively to the public realm? | Is there an opportunity to enhance and/or increase the existing public realm such as accommodating special events and street entertainment? |
| Civil infrastructure | |
| Avoidance of buried utilities | To minimise programme and cost escalation. |
| Vehicles routed in strengthened areas | To avoid long term pavement failure |
| Provision of storage facilities where required. | As deemed necessary for equipment and produce storage. |
| Viability and vitality | |
| To accommodate 70 market stalls of 3m depth and 3m frontage. | Is there physically sufficient space to meet the minimum requirement (70 stalls) |
| The new market should not adversely impact on the role of the PSA or prejudice any redevelopment potential in a way that would harm the retail role of the wider town centre. | To accord with the regeneration emphasis for economic development outlined in the Black Country Joint Core Strategy. |
| Pedestrian movement | Avoidance of exclusion zone. Proximity to main desire line areas and through routes. |
| Accessibility and permeability | |
| Access for emergency vehicles and deliveries | Building regulations define access for fire services to buildings and local |

| | |
|-------------------------------------|---|
| | council regulations define general access to retail areas. |
| Policy requirements | <p>Policy TRAN4 of the Black Country Core Strategy states that new developments should link to existing walking and cycling networks, and to public transport nodes and interchanges. The links should be safe, direct and not impeded by infrastructure provided for other forms of transport.</p> <p>Policy GP6 Disabled People states that developments to which the public have access to will only permitted if designed to provide good access for disabled people.</p> |
| Setting | |
| Compatibility with surrounding uses | Relationship with surrounding retail units, listed buildings, conservations areas and other facilities such as public open space. A sense of identity. |
| Visibility | A visible market is key to its success. The market needs to be a prominent use within the primary retail area. |
| Deliverability | |
| Affordability | The cost of relocating the market to each location. |
| Risk | Is there likely to be stakeholder and public support for the location (e.g. traders, retailers, general public). |
| Programme | Reliance on third parties and timing of surrounding development proposals. |

6 Potential market locations

6.1 Identifying potential market locations

Potential sites for the permanent location of the new market have been identified based on those locations identified in the GVA 2012 Study and sites identified as suitable for retail development in the AAP process.

As part of the preparation of the Walsall Town Centre AAP the Council have identified site opportunities through a robust review process with consideration of a range of evidence. These sites have been identified through a wide array of sources including:

- Sites in the existing UDP that are yet to be developed;
- Waterfront SPD;
- Developer enquiries and pre-applications;
- Employment land review;
- Call for sites; and
- Sites owned by the council.

6.2 Updated locations

This review identified two additional locations to those within the GVA 2012 Study, which were both identified through the APP site opportunities. These include the Gallery Square (AAP50) and the Crown Wharf Retail Park (AAP15). However, four of the AAP opportunity sites that were identified as suitable for retail development have not be taken forward as a potential location for the market as they are not considered available or deliverable for the reasons outlined below:

- Tesco (AAP23) – the site is currently occupied by Tesco with some further offices so no further potential for development;
- Morrisons (AAP32) – currently occupied by Morrisons with no opportunity for a market development;
- Former Tesco, Park Street (AAP60) – planning consent for major retail development (Old Square proposals); and
- Former Shannon’s Mill Front (AA62) – planning consent for the St Matthews development.

In a change to the GVA 2012 Study this review considered the preferred option of The Bridge/Bradford Street/Digbeth as three separate locations, due to the presence of the Exclusion Zone which effectively separates these locations.

In conclusion a total of 12 potential locations for the new market have been identified for review in addition to the current existing location (the base case).



Figure 11: Locations reviewed for market

1. Bradford Street; a pedestrianised area from the War Memorial in Bradford Place, up to the perimeter of The Bridge.
2. The Bridge and lower Park Street; the cross roads of the town centre, currently containing the podium, fountain, Sister Dora statue and the Hippo Statue. Partially including the exclusion zone.
3. The Digbeth area; extending into Market Square and High Street, including part of the current exclusion zone.
4. Lower Hall Lane; extending from the Digbeth area along Lower Hall Lane.
5. Upper Park Street; including the area fronting the Saddlers Centre, and Station Street, passing over the rail tunnel.
6. Gallery Square; a large open area in front of the Art Gallery and Wharf.
7. Old Square Shopping Centre; an indoor traditional shopping complex containing Debenhams an adjacent to the Primark development.

8. Victorian Arcade; an indoor traditional shopping arcade, located on an ancient market area, containing heritage buildings.
9. Jerome Retail Park; located south of the town centre, consisting of large retail stores and open parking facilities.
10. The Saddlers Centre; a modern indoor multilevel shopping centre, well serviced and maintained, with direct links to the rail station.
11. Shannon's Mill; an area that will be developed by the introduction of St Matthews Quarter, and
12. Crown Wharf Shopping Park; a modern retail park outside of the town centre, containing major chain stores with extensive parking.

7 Assessment of potential market locations

7.1 Assessment of locations

Each of the 12 potential market locations have been assessed based on the criteria identified in Table 4. From this assessment preferred locations are recommended.

The assessment is based largely on qualitative professional judgement. As such each criterion may differ in its significance in regard to each location.

7.1.1 Planning policy

The relevant planning policy framework described in this report indicates that any new retail development should take place within the Primary Shopping Area (PSA) and integrate positively with development opportunity areas. Several of the locations identified including the Crown Wharf Shopping Park, Jerome Retail Park and Gallery Square fall outside of the PSA and are not located within any of the development opportunity areas identified within the Walsall UDP or emerging Walsall Town Centre AAP. There is potential to review other material considerations, which could outweigh these policy considerations. However as there are locations available that comply with these policy requirements these should be regarded as more suitable. Those locations that are outside of the PSA have therefore been discounted as potential market locations, as they would present a departure for the statutory Development Plan.

Within the PSA, the St Matthews's Quarter development is a key development opportunity area, and the locations within this area consisting of Lower Hall Lane, Old Square Shopping Centre, Digbeth and Shannon's Mill are supported by the Development Plan and emerging policy.

7.1.2 Urban realm

The existing urban realm has limited influence on the selection of the preferred market location in regard to any constraint that it may pose. Rather, this assessment seeks to gauge the level of opportunity the urban realm at each location may provide for public open space improvements. For example, space for the provision of street entertainment or opportunities for positive relationships with existing heritage features.

Areas located in modern retail parks out of the town centre such as Crown Wharf Shopping Park and Jerome Retail Park, or adjacent to known regeneration areas such as Digbeth, Lower Hall Lane and Shannon's Mill provide little opportunity for such benefits. Areas within the conservation area, featuring listed buildings such as Park Street, The Bridge and Bradford Street offer excellent opportunity for such benefits and comply strongly with these criteria.

7.1.3 Civil infrastructure

Civil infrastructure is associated with physical constraints to the practical development of an area.

Throughout the town centre there is a network of buried utilities below the ground as would be expected in any similar environment. All of these must be taken into account during the design, but are common to all proposed locations and therefore are not a critical deciding factor.

Areas immediately adjacent to building frontages along Park Street are known to have a weak pavement unable to support vehicle loads, and due to the number of shallow utilities in this areas, any strengthening works would be prohibitive to programme, restricting the location of market stores and vehicle routes.

An existing culvert passes below part of The Bridge area which is extremely shallow preventing the use of imbedded foundations above this area and again restricting vehicle routes.

There are numerous revenue making items of street furniture such as phone boxes, illuminated advertising and ATM machines, spread through the areas, principally upper Park Street and Lower Hall Lane, and the removal or relocation of these is both politically sensitive and linked to contracts that will be prohibitive to the programme.

7.1.4 Viability and vitality

The ability to accommodate the critical mass number of 70-75 stalls, whilst not adversely impacting on the existing PSA or prejudicing future redevelopment potential are key viability and vitality concerns.

Future developments including the former Tesco Metro site, Old Square Markets phase 2 and the St Matthews Quarter (Norton and Proffitt Ltd) are in varying stages of planning and construction. The success of a permanent market immediately adjacent to these sites will be influenced by their success and the timing of these developments. Part of The Bridge area and Digbeth areas fall within the Exclusion Zone associated with the former Tesco Metro site redevelopment restricting the available space for the market in these areas.

Larger modern retail sites such as Crown Wharf Shopping Park and Jerome Retail Park serve large national chain stores, at odds with the small scale nature of the markets and would not naturally coexist with differing target audiences. In addition desire lines are distinctly different to those common of a town centre environment.

Many of the locations identified are incapable of accommodating the critical mass of market stores required, if the stores are to be laid out in a way that is conducive to pedestrian movement, delivery and emergency service access. The Victorian Arcade is especially restricted with narrow alleyways and closely spaced shop frontages. Both the Saddlers Centre and Old Square Market have similar restrictions, unless existing retail floor space is allocated to the markets.

7.1.5 Accessibility and permeability

The new market must comply with standards, policy and best practice associated with access and movement throughout the market areas. Consideration of how people can get to and from the market is also vital.

Areas outside of the town centre including the Crown Wharf Shopping Park and Jerome Retail Park have good private car access and parking, but poor natural linkage to the town centre. The areas within the town centre are less well served, with local parking provision being a recognised concern.

The Bridge, Bradford Street, Park Street and Digbeth are well served by the rail station on Park Street, local bus gyratory in Bradford Place and the national bus station adjacent to St Pauls Church. They form part of a continuous pedestrianised zone that provides safe and secure access on foot and for disabled people.

Storage is also an issue for the market, whether it is associated with produce or the stall infrastructure itself. The indoor options including the Saddlers Centre have opportunity to incorporate this storage into the building footprint; however outdoor options are as limited as the current market arrangements. Those locations associated with main shopping streets such as The Bridge, Park Street, Bradford Street and Digbeth have no immediate storage facilities or amenities available.

7.1.6 Setting and Visibility

The new market must compliment the area in which it is located, and be visible to the general public with signage. In particular, respecting the setting of the conservation area and listed buildings is a requirement.

Areas that are natural through-routes for people arriving in Walsall town centre and in the main shopping streets such as The Bridge, Bradford Street and Digbeth are excellent locations for the Market and compliment the retail stores by bringing in potential additional customers. The Bridge is at the cross roads of the town centre and therefore a focal point for many people visiting Walsall.

The Shannon Mill and Lower Hall Lane sites both have poor accessibility. They are located away from natural pedestrian desire lines, being on route to no specific location, and are not readily visible from the main shopping streets. The development of the St Matthew's Quarter and former Tesco Metro site will benefit the Digbeth and Lower Hall Lane site in the long term by encouraging people to that area. The impact on the Shannon Mill site will however be detrimental as it will be in effect located at the rear of both this development and the existing Asda store, and is not well located as a result.

7.1.7 Deliverability

Regardless of the advantages and disadvantages of the various locations under each criterion, if they are not deliverable then they are not viable as a market location.

Locations that are owned by third parties, such as The Saddlers Centre, Old Square Shopping Centre, Crown Wharf Shopping Park, Jerome Retail Park and the Victorian Arcade are influenced by their owner's aspirations and demands. These locations will be subject to long term leases, more onerous insurance terms associated with private non-government backed companies and lack of control by Walsall Council over long term market plans. In addition many of these locations require significant reworking to accommodate the market, the programme for which may not coincide with Walsall Council's requirements.

The Shannon's Mill site, Lower Hall Lane and Old Square Shopping Centre are all subject to the phasing and construction of future developments that are yet to be programmed, and as such are not suitable locations for the new market under the current programme of Walsall Council.

Upper Park Street is partially located above the rail tunnel from Walsall train station. It is known that this rail line is due for electrification in the near future as part of Network Rail plans, a process that may result in the need to lift the tunnel levels, and rebuild Park Street. As such Upper Park Street cannot be a recommended location for a permanent Market at this time.

7.2 Assessment summary table

The table below provides a summary of the assessment of each location against the location requirements set out in Table 5.

For ease of reference the table has been colour coded as follows:

- Red – Major non-compliance with criteria requirements.
- Amber – Neither a major compromise or benefit to location.
- Green – Strong compliance with criteria requirements.

Table 5: Potential locations assessment summary

| Potential market locations | Planning policy | Public realm | Civil infrastructure | Viability and vitality | Accessibility and permeability | Setting and visibility | Deliverability |
|--------------------------------------|--|--|---|--|--|--|---|
| Existing market location (Base case) | Inside PSA. Temporary planning permission only. | Numerous impressive architectural frontages, dating back to the Victorian era that could be enhanced from improved adjacent public realm. | Storm water culvert passes below western building frontages, restricting above ground loading and buried foundation use | Restricts retail frontages. Limited by exclusion zone. | Part of the main shopping area and close to public transport and public car parks. | Within the Bridge Street Conservation Area. Located on natural thoroughfare routes within the town. | Limited by the exclusion zone. Objections from local retailers in current format. |
| Bradford Street | Inside PSA. | Numerous impressive architectural frontages, dating back to the Victorian era that could be enhanced from improved adjacent public realm. | Storm water culvert passes below western building frontages, restricting above ground loading and buried foundation use | Potential to accommodate 20-30 stalls. Partly restricts retail frontages. | Excellent links from public transport and pedestrian routes. | Within the Bridge Street Conservation Area. Located on natural thoroughfare routes within the town. | Public area under the control of Walsall Council. |
| The Bridge and Lower Park Street | Inside PSA. | Numerous impressive architectural frontages, dating back to the Victorian era that could be enhanced from improved adjacent public realm. | Storm water culvert passes below western building frontages, restricting above ground loading and buried foundation use | Potential to accommodate 40-60 stalls with removal of podium. Partially within the exclusion zone. | Excellent links from public transport and pedestrian routes. | Within the Bridge Street Conservation Area. At the crossroads of the town centre. | Public area under the control of Walsall Council, but reliant on the removal of the podium, and restricted in size by the exclusion zone. |
| The Digbeth area | Within the PSA. Development opportunity area, as per Policy WA10 of the UDP. Within the St Matthew's Quarter as identified in the APP Issues and Options document. | Forms an existing public open space/square, which could be enhanced. Future proposed development of the Old Square shopping centre will impinge into this space reducing its viability. | Anecdotal evidence of underlying drainage channels not recorded on records. | Potential to accommodate 50-60 stalls. Development of Old Square shopping centre will reduce available stall space. Partially within the Exclusion Zone. | Pedestrian accessibility would be improved by the completion of the former Tesco Metro redevelopment, which would attract customers to this area of the town centre. | Within the Bridge Street Conservation Area. Located on natural thoroughfare routes within the town. Will be improved by the development of St Matthews Quarter. | Largely within the current exclusion zone and potential future Old Square Market phase 2 development. |
| Lower Hall Lane | Inside PSA Within the St Matthew's Quarter as identified in the APP Issues and Options document. | Limited opportunity in current state, but maybe enhanced by future development of St Matthew's Quarter. | Existing ATM facility restricting stall positioning. | Potential to accommodate 15-25 stalls. Close to secondary retail units, no real positive benefit. | Accessible to vehicles, but narrow access roads. | Located away from natural desire lines. | Affected directly by the St Matthews Quarter development. |
| Upper Park Street | Inside PSA. | Listed Public house could be enhanced from adjacent public realm works, but other buildings offer less opportunity for enhancement. | Old footpath areas adjacent to building frontages lack adequate structural capacity for vehicles. Rail tunnel support beams lack capacity for vehicles. Multiple existing telephone and signage features with limited scope for relocation. | Potential to accommodate 40-50 stalls. | Excellent links from public transport and Pedestrian routes. | Located on busy thoroughfare routes within the town. | High risk of the areas being dug up to replace the rail tunnel. |

| | | | | | | | |
|----------------------------|--|---|-----------------------------|--|--|--|--|
| Gallery Square | Whilst located within the town centre boundary it is located outside of the PSA, (UDP Policy WA1) and development opportunity areas (UPD WA7). | The market could increase the number of visitors and vibrancy of the existing public open space. There is also potential for canal side activities (UDP Policy LC9 (a)) adjacent to the site. | No known major restrictions | 30-40 stalls depending on layout. | Good connectivity, but on the edge of the current pedestrian zone. | Out of sight of main pedestrian desire lines | No known objections Public events? |
| Old Square Shopping Centre | Inside PSA. Within the St Matthew's Quarter of Walsall Town Centre, an area identified for regeneration potential. | Indoors | Indoors | 10-15 stalls in non-retail space, but potentially 18,000sqft market hall scheme prepared by Threadneedle to accommodate 60-80 stalls. Adjacent to the former Tesco Metro redevelopment with potential pedestrian links. However, the site is within the Old Square Phase 2 development area and therefore could constrain the flexibility of this proposal. | One way and narrow passage with limited vehicle access. | Part of the historic core of the town centre. Accessed by narrow passageway and not therefore immediately obvious. | Reliant on third parties associated with the Old Square Phase 2 proposals. |
| Victorian Arcade | Inside the PSA. | Contains a variety of heritage listed buildings that could benefit from public realm improvements | Indoors | Good compatibility with retail units. 10-15 stalls only, with limited space between shop frontages. | Narrow access, with no provision for vehicles | A Listed Building, locating the market within the arcade would need to protect and enhance the historic character of the arcade. Accessed by narrow passageway and not therefore immediately obvious. | Reliance on third parties associated with land ownership and leaseholders. |
| Jerome Retail Park | Outside of the PSA | Open modern modular retail park with limited scope for improvements via public realm changes | No known major restrictions | 60-80 stalls depending on location. | Good access, but poor connectivity with the town centre. | Away from town centre and natural desire line. | Reliance on third parties associated with land ownership and leaseholders. |
| Saddlers Centre | Inside the PSA. | Indoors | Indoors | 20-30 stalls within non-retail areas, but potentially up to 35,000sqft available to accommodate 60 stalls with room for expansion. | Walsall rail station is contained within the Saddlers Centre. | Partially within the Bridge Street Conservation Area. Linked to Walsall rail station creating forced pedestrian movement and good visibility. | Reliance on third parties associated with land ownership and leaseholders. |

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|---------------------------|--|--|--|--|---|--|---|
| Shannon's Mill | Inside the PSA. Within the St Matthews Quarter as defined by the AAP Issues and Options Document. | Area may be enhanced by future development. | Significant variation in ground levels may inhibit flexibility of future market space. | Sufficient size to accommodate 70 stalls with expansion potential. Adjacent to the planning consent (Norton and Proffitt Ltd) for development within the St Matthews Quarter. Not within primary shopping frontage or on core desire line route. | Limited access from George Street due to topography. Access restricted to Lower Hall Lane only. | Would not be visible to shoppers and located to the rear of major development proposal (Norton and Proffitt) and other retail units including the Asda superstore. | Programme for the Norton and Proffitt is uncertain due to recent Judicial Review proceedings. |
| Crown Wharf Shopping Park | Outside of the PSA. | Open modern modular retail park with limited scope for improvements via public realm changes | No known major restrictions | Existing retail, but potential to distract from the retail core. | Good access by car from further afield. Limited connectivity with the town centre. | Out of sight of main pedestrian desire line. | Reliance on third parties associated with land ownership and leaseholders. |

7.3 Preferred options

Following our assessment as detailed above, the following locations will not be taken forward for further consideration due to their non-compliance with multiple major criteria.

- Upper Park Street;
- Jerome Retail Park;
- Shannon's Mill; and
- Crown Wharf Shopping Park.

The following locations have scored most positively in regard to the assessment criteria.

- Bradford Street;
- The Bridge and lower Park Street; and Saddlers Centre.

The following locations are have some issues, but may be combined with other areas if required to provide a suitable venue for the market.

- Old Square Shopping Centre;
- Victorian Arcade;
- Gallery Square;
- Digbeth; and
- Lower Hall Lane.

7.4 Recommendation

From the review undertaken prior to any analysis of the on-going consultation process results, it appears that the recommendations of the GVA report 2012 that the current temporary location of the Market is the most suitable for a permanent location, subject to the development of a suitable layout, public realm improvements and improved market offer.

The Saddlers Centre is an equally promising location, but would require a major change to the markets strategy, by moving the stalls indoors to a privately leased site, thereby relinquishing an element of control by Walsall Council. The impact on the Traders with regard to rental costs, lease length and stalls equipment, will also result in loss of traders interest. Finally the availability of the Saddlers Centre is uncertain and not compatible with the time frame of the Council for the Markets relocation.

It is recommended that the market be retained in The Bridge, Digbeth and Bradford Street area of Walsall.