Lichfield district council

EVIDENCE ON RETAIL MATTERS FOR THE LDF CORE STRATEGY: 2009 UPDATE

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EXECUTIVE SUMMARY

Background

1. This report has been prepared for Lichfield District Council by England & Lyle to assist the Council in preparing retail policies in the LDF Core Strategy. It follows a Background Retail Review in April 2007. The report is a 2009 Update of a previous version in July 2007 which has been superseded. It has been prepared in the context of the draft Regional Spatial Strategy which identifies Lichfield as a strategic town centre – a focus for major retail development (in comparison goods) of more than 10,000 sq.m. gross floorspace. In RSS terms Burntwood is a non-strategic centre that should meet local needs. Reference is made to the RSS Strategic Centres Study.

2. The Inspector's Report on the Examination into the LDF Core Strategy (July 2006) found that there were deficiencies in the evidence base regarding retail policy generally and more specifically regarding Burntwood. The Inspector concluded that the Core Strategy's proposals for Burntwood were unsound. Taking on board the Inspector's findings, this report seeks to advise the Council on the evidence base for shopping policy in the LDF Core Strategy. A range of evidence on retail matters is covered in the report to enable the Council to produce a sound Core Strategy.

Role and Hierarchy of Centres

3. Advice is given on the role and hierarchy of centres in Lichfield District. We agree that Lichfield functions as a Large Town Centre as defined in the Structure Plan and is a strategic centre in the regional and sub-regional retail hierarchy. This role should be confirmed in the LDF Core Strategy.

4. In the hierarchy defined in the Structure Plan, Burntwood is classed as a Smaller Town Centre. At present Burntwood functions as a "district centre" in PPS6 terms. We believe that there is scope for Burntwood to expand as a Smaller Town Centre to improve its retail offer but to maintain its status in the retail hierarchy.

5. Our advice is that, in the retail hierarchy for Lichfield District, Chasetown should be identified as a Large Local Centre and that other smaller centres should be identified as Smaller Local Centres or Village Centres.

Need Assessment

6. The time horizon of the need assessment for the LDF Core Strategy has been extended to 2026. Forecasts of population and expenditure in the Lichfield study area are made for 2016, 2021 and 2026. The capacity analysis up to 2026 comprises a number of steps taking account of future expenditure, turnover, leakage of trade and potential for clawback, surplus expenditure capacity, and recent developments and commitments. Capacity is assessed for the Lichfield and Burntwood catchment areas.

7. In convenience goods there is a small capacity for additional development in Lichfield up to 2026 after allowing for the replacement Tesco store. In Burntwood there is also a small capacity in convenience goods up to 2026 after allowing for commitments. In comparison goods there is a negative capacity for additional development in Lichfield up to 2021 because the available capacity is taken up by the commitment for the

Friarsgate redevelopment scheme in Lichfield but there is a surplus capacity in 2026. There is no capacity for additional comparison goods development in Burntwood until after 2011 because of the committed scheme by London & Cambridge Properties (LCP). There is a small surplus capacity from 2016 onwards. There is capacity for a limited amount of additional bulky goods development in Lichfield after 2011.

8. The long term capacity forecasts have been used to estimate floorspace capacity in Lichfield and Burntwood up to 2026. In convenience goods the floorspace capacity in Lichfield is between 1,800 and 4,900 sq.m. gross. It is likely to be at the lower end of this range. If new development takes the form of supermarket floorspace the capacity is likely to be at the lower end of this range. There is potential in the longer term for an additional foodstore or an extension to one of the existing foodstores. In Burntwood the assessment indicates a floorspace capacity of up to 3,000 sq.m. gross in convenience goods There is potential in the longer term for a discount foodstore or an extension to one of the existing foodstores.

9. In comparison goods there is a floorspace capacity in Lichfield of up to 5,000 sq.m. gross in 2026 which could be met by further redevelopment in the city centre. There is floorspace capacity for additional comparison goods development in Burntwood in 2026 of up 3,000 sq.m. gross. In bulky goods there is floorspace capacity for additional bulky goods development of 3,500 sq.m. gross in Lichfield in 2026, in addition to the development of the Eastern Avenue/Vulcan Road scheme.

10. The sensitivity of the need assessment has been tested using a range of assumptions on retail expenditure growth, retention levels, increases in floorspace efficiency and implications of the growth of Internet shopping in the longer term. These assumptions represent a range of scenarios to be applied as alternatives to the main capacity analysis. There are 3 scenarios for convenience goods and 6 scenarios for comparison goods, for both Lichfield and Burntwood, and they have been examined in terms of the sensitivity of floorspace capacity.

Retailing in Lichfield City Centre

11. The report considers the potential for further retail development in Lichfield city centre to meet longer term needs. It would not be appropriate to try to accommodate further foodstore development in the city centre. Our comments on opportunities for further retail development are limited to comparison goods. The floorspace capacity represents a potential site area requirement of up to 1.0 hectares.

12. Opportunities for further retail development in the city centre have been assessed. The Bird Street car park offers the best potential in Lichfield city centre for further retail development in the long term, in addition to the Friarsgate scheme. There is also redevelopment potential in the Backcester Lane area.

Retailing in Burntwood

13. The floorspace capacity assessed for Burntwood in 2026 is up to 6,000 sq.m. gross in addition to commitments. This is the appropriate scale of retail development in an enlarged town centre in Burntwood based on a modest increase in the retention levels for convenience and comparison goods in the Burntwood primary catchment area.

14. This additional floorspace capacity would have to be accommodated on the Olaf Johnson site. There are no other options for new retail development in Burntwood. The Olaf Johnson site would meet the additional capacity in Burntwood for both convenience and comparison goods shopping. However, there is no capacity for further retail development in Burntwood until after the LCP on the Hoardings site scheme has been completed and fully trading.

15. The LCP scheme should satisfy market demand in the short term. The level of additional need in the period up to 2026 should be capable of being sustained in terms of market demand and it is a scale of development that should be commercially viable.

16. An assessment has been made of the retail impact of an enlarged town centre at Burntwood. Our review of the proposals by LCP for comparison goods in 2016 shows that the scheme would not have any significant trading impacts on other centres. We have also carried out a cumulative impact assessment of the trading impact of the LCP scheme together with the longer term option of further retail development on the Olaf Johnson site. There would still not be any unacceptable impacts on centres. We have also tested the option of a different form of development assuming bulky goods development on the Hoardings site. Again there would not be any significant levels of retail impact in PPS6 terms.

17. There is no risk of adverse impacts on comparison goods in Cannock and Walsall town centres. For both the LCP scheme and any further development in Burntwood town centre, the largest trade diversions arising outside the study area are likely to be on the out-of-centre retail parks in Cannock, Walsall, Tamworth and Burton.

18. An analysis of shopping patterns in the Burntwood area shows that the vast majority of shoppers in Burntwood for both food and non-food goods live in the Burntwood wards. Relatively few live in Walsall District (Brownhills area) or Cannock Chase District (Norton Canes and Rawnsley). The analysis confirms that the primary catchment area of Burntwood is the Burntwood urban area and that the Brownhills/ Norton Canes/Rawnsley area is a more secondary catchment area.

19. Burntwood can readily be accessed by bus from Norton Canes, Brownhills and other settlements in the secondary catchment area. The frequency of these services could be increased if there is demand in the future. An enlarged centre at Burntwood would be accessible by public transport and sustainable.

20. England & Lyle have had consultations with officers of Walsall and Cannock Chase District Councils about the implications of proposals for further retail development in Burntwood on centres in these neighbouring Districts.

21. Cannock Chase Council recognises that Burntwood is a centre that should meet local needs, like Rugeley. The Council have concerns about the future role of Burntwood centre in terms of its impact on Cannock but this would not be an issue as long as the scale of development in Burntwood meets local needs. There is potential for more people from Norton Canes to make shopping trips to Burntwood by public transport.

22. Walsall Council has concerns about the possible implications of an enlarged town centre in Burntwood because it could draw trade in comparison goods from the Walsall catchment. The Council acknowledges that the scale of development approved

in Burntwood is consistent with meeting local needs but considers that it would not be acceptable for shopping in Burntwood to increase its market share of trade from the Brownhills area.

23. Walsall Council do not regard Burntwood as a sustainable location for large-scale retail development. There could be a risk that new development in Burntwood would increase car-borne trade from areas such as Brownhills. However, this report shows that areas in the secondary catchment area of Burntwood are accessible by public transport from Brownhills and other settlements. Further development in Burntwood at an appropriate scale would reduce longer distance car travel to Walsall, Cannock and other centres. We are confident that the scale of development we have identified in Burntwood is appropriate to the role of the centre in meeting local needs.

Floorspace Limits

24. We would advise that it is preferable to set floorspace limits that are based on the amount of <u>new</u> retail floorspace that should be allowed, in line with the approach adopted in RSS policies. In Lichfield city centre an appropriate floorspace limit should include the committed Friarsgate redevelopment scheme, the replacement Tesco store and the additional floorspace capacity we have identified by 2026 on sites within the city centre. We would suggest that the LDF Core Strategy refers to a floorspace limit of 42,000 sq.m. gross of which 35,000 sq.m. gross is in comparison goods.

25. In Burntwood an appropriate floorspace limit should include the committed LCP scheme, the Morrisons extension and the additional floorspace capacity we have identified by 2021 on the Olaf Johnson site. We would suggest that the LDF Core Strategy refers to a floorspace limit of 16,000 sq.m. gross, of which 13,000 sq.m. is in comparison goods.

26. We are convinced that the scale of development we have proposed in Burntwood, and the corresponding upper floorspace limit, reflects local needs. Burntwood would not change its status in the retail hierarchy. It would not become a strategic centre but it would have an enhanced role as a town centre, better serving the local needs of residents of Burntwood and the surrounding area.

Policy on Smaller Centres

27. We would advise that policy on local centres should be strengthened in the LDF so that the smaller centres we have identified in the retail hierarchy fully meet the needs of the local population.

28. The Council has identified an option of developing an expanded settlement at Fradley, north of Lichfield. There is capacity in the Lichfield catchment area for a new local centre in Fradley. Population growth in the area could support in the region of 650 sq.m. gross floorspace. There is already a planning consent for a local centre in Fradley of 1,100 sq.m. gross floorspace which will meet future needs. The centre should be allocated as a ‘village centre’.

1. INTRODUCTION

1.1 This report has been commissioned by Lichfield District Council to assist the Council in preparing retail policies in the LDF Core Strategy. It deals with the planning context for the Core Strategy on retail policy, the role and hierarchy of centres in Lichfield District, and the assessment of need in the LDF period to 2026. Advice is then given on retailing in Lichfield city centre and in Burntwood town centre. Finally comments are made briefly on floorspace limits and policy on smaller centres.

1.2 The report addresses matters raised in the Inspector's report on the Examination of the LDF Core Strategy in 2006 in relation to the evidence base for shopping policy in the LDF Core Strategy. It seeks to rectify deficiencies in the evidence base so that the shopping policies are fully justified. The emphasis is on quantitative need, the potential for further retail development in Lichfield city centre and the appropriate scale of retail development in Burntwood in the longer term and its implications in terms of impact on the vitality and viability of neighbouring centres and sustainability.

1.3 In February 2007 England & Lyle were appointed by Lichfield District Council to provide retail consultancy advice and technical assistance to the Council in relation to planning applications for retail development in Lichfield and Burntwood and advice on retail policy for the Local Development Framework. The first stage of this work was the preparation of a Background Retail Review which was completed in April 2007. Health check appraisals were carried out in Lichfield and Burntwood centres in March 2007 to assess their vitality and viability.

1.4 As part of our consultancy advice to the Council, England & Lyle have reviewed several planning applications for retail development. The following planning applications have been approved by the Council since 2006.
<u>(1) Birmingham Road (Friarsgate), Lichfield</u>
Redevelopment of land in the Birmingham Road area of Lichfield city centre by S. Harrison Developments Ltd for mixed use development including major retail development (the Friarsgate scheme).
<u>(2) Eastern Avenue/Vulcan Road, Lichfield</u>
Redevelopment of an out-of-centre employment site in Lichfield for bulky goods retailing.
<u>(3) Tesco, Lichfield</u>
Redevelopment of the site of the existing Tesco store and Focus DIY store on the north eastern edge of Lichfield town centre together to provide a larger replacement Tesco store.
<u>(4) London & Cambridge Properties (LCP) scheme, Burntwood</u>
Non-food retail development on land within the allocated Burntwood town centre to the west of the Morrisons foodstore.
These developments are included as commitments for the purposes of our assessment of quantitative need.

1.5 The current report is an Update of the report Evidence on Retail Matters for the LDF Core Strategy (July 2007). It is a comprehensive of the original report and the July 2007 document has been superseded. The health checks have been updated and are included as an Appendix to this Update report.

2. EVIDENCE REQUIRED FOR THE LDF CORE STRATEGY

Planning Policy Statement 12: Local Development Frameworks

2.1 The Planning and Compensation Act 2004 sets out the requirements for preparation of Local Development Frameworks (LDFs). Advice on the evidence base required for LDFs is contained in PPS12. LDFs are intended to streamline the local planning process and promote a proactive, positive approach to managing development. The key aims of the new development plan system include soundness. Local development documents must be soundly based in terms of their content and the process by which they are produced. They must also be based upon a robust, credible evidence base. A comprehensive and credible evidence base should underpin the policies in local development documents.

2.2 The policies prepared by the LPA should be founded on a thorough understanding of the needs of their area and the opportunities and constraints which operate within that area. LPAs should prepare and maintain an up-to-date information base on key aspects of the social, economic and environmental characteristics of their area, to enable the preparation of a sound spatial plan meeting the objectives of sustainable development. LPAs are required to keep under review the following matters:

(i) the principal physical, economic, social and environmental characteristics of their area;
(ii) the principal purposes for which land is used in the area;
(iii) the size, composition and distribution of the population of the area;
(iv) the communications, transport system and traffic of the area (including accessibility by public transport); and
(v) any other considerations which may be expected to affect those matters.

2.3 The evidence base is critical to the preparation of local development documents. LPAs should ensure that the delivery of strategic and regional requirements is not compromised by unrealistic expectations about the future availability of infrastructure, transportation and resources.

2.4 The presumption will be that the development plan document is sound unless it is shown to be otherwise as a result of evidence considered at the Examination. The criteria for assessing whether a development plan document is sound will apply individually and collectively to policies in the development plan document. A development plan document will be sound if it meets a number of tests, one of which is that the strategies/policies/allocations represent the most appropriate in all the circumstances, having considered the relevant alternatives, and they are founded on a robust and credible evidence base.

Evidence on Retail Matters

2.5 The range of evidence on retail matters covered in this report that is required to enable the Council to produce a sound Core Strategy is listed below:

- The relevant national policy context in Planning Policy Statement 6, Planning for Town Centres (PPS6).
- The relevant strategic policy context set out in the draft Regional Spatial Strategy for the West Midlands.
- The retail hierarchy in Staffordshire and the West Midlands.

- Profiles of existing shopping provision in centres in Lichfield District.
- The study area to be used for assessing the retail system in Lichfield District.
- Population estimates and forecasts in the Lichfield study area.
- Retail expenditure estimates and forecasts in the Lichfield study area.
- Quantitative need for additional retail development in Lichfield and Burntwood.
- Floorspace capacity for additional retail development in Lichfield and Burntwood.
- Sensitivity of the need assessment using a range of assumptions on:
    - retail expenditure growth
    - retention levels
    - increases in floorspace efficiency
    - implications of the growth of Internet shopping in the longer term
    - implications of additional housing growth in the District
- The appropriate scale of retail development in Lichfield city centre.
- Opportunities for further retail development in the city centre (in addition to the Friarsgate scheme).
- Longer term needs in Burntwood including options for an enlarged town centre in Burntwood, the extent of ‘local need’ in Burntwood, and the appropriate scale of retail development in a new centre in Burntwood in the context of local need and the potential for additional comparison goods shopping.
- A review of information available on retail demand in Burntwood and the scale of development in Burntwood that would be commercially viable.
- Impact of an enlarged town centre at Burntwood on the vitality and viability of other neighbouring centres in the catchment area.
- Sensitivity of impact assessment based on the amount of floorspace and a mix of retail formats (High Street and bulky goods)
- Sustainability of an enlarged town centre at Burntwood, including the accessibility of Burntwood town centre and implications for car travel and sustainability.
- Indicative upper levels of floorspace in Lichfield and Burntwood centres (taking account of need and the physical capacity of the centres).
- Advice on policy for district and local centres.
- Need for new local centres in the District (in the context of housing growth).

3. CONTEXT FOR THE LDF CORE STRATEGY

Regional Spatial Strategy

3.1 Regional Planning Guidance for the West Midlands (published in June 2004) subsequently became the West Midlands Regional Spatial Strategy (RSS11) in September 2004 (covering the period to 2021). When the WMRSS was published in June 2004, the Secretary of State supported the principles of the strategy but suggested several issues that needed to be developed further. This Revision process is being undertaken by the West Midlands Assembly in three Phases:
<u>Phase One</u> has focused on developing a long term sub-regional strategy for the Black Country. The final Phase One Revision was published by the Secretary of State in January 2008 and this has been incorporated into the WMRSS.
The <u>Phase Two</u> Revision Draft was submitted to the Secretary of State in December 2007 and was the subject of consultation until December 2008. The second phase of the revision covers housing, economic and other matters in the period up to 2021 and 2026, including retail matters.
<u>Phase Three</u> examines critical rural services, culture/recreational provision, environmental issues, minerals, etc. Consultations will commence in June 2009.

3.2 The policies most relevant to retail development are UR3 (Enhancing the Role of City, Town and District Centres), PA11 (The Network of Town and City Centres), PA12A (Comparison Retail Requirements) and PA12B (Non-Strategic Centres). Policy UR3 seeks to enhance city, town and district centres to play a leading role in urban renaissance programmes in order to provide services for local communities, a sense of identity and drivers for local economic growth.

3.3 The RSS does not set out a formal hierarchy of roles for centres in the Region. Policy PA11 identifies a network of 25 strategic town and city centres which should be the focus of major retail developments (i.e. those of more than 10,000 sq. metres gross floorspace in comparison goods), uses which attract a large numbers of people including major cultural, tourist, social, leisure and community venues and large-scale office developments (those with a gross floorspace of 5,000 sq. metres or more). Lichfield is one of the smallest of the 25 strategic centres in retail terms. It is placed in Tier 4 of the retail hierarchy, together with Cannock, Stafford and Tamworth. Walsall and Burton are in Tier 3.

3.4 For all other centres (including Burntwood), development plans should identify and develop policies for such centres which best meet local needs and be proactive in encouraging appropriate development to maintain and enhance their function as town centres. Whilst the emphasis in the RSS is on the network of strategic centres, the role and importance of local centres is recognised. Future development in these other non-strategic centres will be of a more modest scale, varying according to local circumstances and local need.

3.5 RSS Draft Policy PA12A shows the comparison retail floorspace requirements up to 2021 and 2026. For Lichfield the floorspace requirements are 25,000 sq.m. gross in 2021 and 35,000 sq.m. gross in 2026. These figures are inclusive of commitments at April 2006.

3.6 RSS Draft Policy PA12B on Non-Strategic Centres states that local authorities should identify non-strategic centres and develop policies to meet local needs. Any proposals for an increase in comparison retail floorspace (of 10,000 sq.m. or more) should be accompanied by evidence to demonstrate that:

- there is a clear need for the scale of development proposed
- the proposal would not have an adverse impact upon or put at risk the delivery of development within a strategic centre, and
- there is a satisfactory public transport access to the centre.

RSS Strategic Centres Study

3.7 As part of the Phase 2 revision process for the RSS, the West Midlands Regional Spatial Strategy Regional Centres Study (RCS) was undertaken by Roger Tym & Partners in March 2006. The prime purpose of the study is to assist in identifying the centres in the Region where major new retail, leisure and office development should be focused. It is a non-statutory report supported by a range of technical papers and appendices. In retail terms it largely focuses on comparison goods retail issues but provides useful qualitative information on Lichfield and its role within the network of centres within the Region. The RCS does not refer, or apply, to Burntwood.

3.8 The main aims of the study are to provide a clear guide to:-

(i) the scale of retail, leisure and office development that should be accommodated in the Region in the period to 2011 and in more broad indicative terms from 2011 to 2021;

(ii) how any identified growth in demand for retail, leisure and office development should be distributed across the Region, taking into account the provisions of adopted development plans;

(iii) how any identified capacity can be diverted to those centres which will best promote accessibility and use of sustainable modes of transport, are least likely to undermine vulnerable centres and best meet any gaps in retail, leisure and office provision across the Region; and

(iv) market perceptions of the opportunities for major investment.

3.9 In addition, the study advises on the thresholds for defining 'large scale development proposals' for the town centre uses. It recommends thresholds for defining 'large-scale development proposals' for referral of proposals to the Regional Planning Board. For Tier 5 centres including Lichfield the threshold for retail developments is 10,000 sq.m. gross floorspace.

3.10 Lichfield is considered to be vulnerable due to the lack of development of any material scale in or adjacent to the centre in recent years, which means that the gap between Lichfield, at the bottom of the hierarchy, and other strategic centres that have benefited from development, has widened.

3.11 Lichfield is also one of the centres considered to the most constrained in terms of physical capacity for retail and commercial leisure development. The historic city centre faces conservation area, green belt and railway line constraints. However, these constraints are not so tight that they would prevent significant expansion in some directions without the need to redevelop historic buildings. The study acknowledges that the application of the sequential approach may fail to identify a sufficient supply of sites which are suitable, available and viable for town centre uses, and for which out-of-centre investment in locations elsewhere within their urban areas, in locations well served by public transport, may have to be contemplated.

3.12 In terms of Accessibility, the RCS defines centres that are least locally dominant meaning that people who live there travel to more distant centres. This policy approach aims to emphasise/prioritise extra provision in these centres. It gives priority to Lichfield and several other centres. On Regeneration, the policy approach aims to identify centres in need of regeneration. These are centres described as showing some signs of weakness. These priority centres include Lichfield.

RSS Spatial Options

3.13 As part of the Phase Two Revision a technical paper was prepared in December 2007 on Regional Centres entitled ‘Prosperity for All’. The primary source of background information is the West Midlands Regional Centres Study (RCS). The Study was used to inform the preparation of the Spatial Options for the Phase 2 Revision.

3.14 A Spatial Options Consultation Report on the RSS Phase 2 Revision was subject to consultation between January and March 2007. It sets out a wide variety of questions and choices relating to the future development of the Region.

3.15 Following consultations the Regional Assembly decided that the scale and distribution of comparison retail floorspace requirements should be reviewed in the light of a review of the scale and distribution of new housing, more up-to-date information on the expected impact of electronic retailing, and the need to roll forward the projections to 2026. Therefore RTP undertook an update of the RCS in November 2007 in relation to comparison retail floorspace needs. The update identifies a comparison goods requirement before commitments in Lichfield of 20,000 sq.m. in 2021 and 25,000 sq.m. in 2026. These figures represent net sales area, not gross floorspace.

Examination of the LDF Core Strategy 2006

3.16 The Inspector’s Report on the Examination into the LDF Core Strategy Development Plan Document was published in July 2006. At the Examination the Inspector considered whether the requirements of the Planning Act 2004 had been satisfied regarding the soundness of the submitted Core Strategy.

3.17 The Inspector concluded that there were two serious deficiencies, one concerning the supply of housing land and the other concerning deficiencies in the evidence base. One of the serious consequences was that the strategy contained policies that are not clearly justified. Accordingly it was not possible to say with confidence that the strategy/policies/allocations are the most appropriate in all the circumstances (as required by PPS12). As these two deficiencies related to critical aspects of the strategy they led the Inspector to the conclusion that the submitted Core Strategy was fundamentally unsound and that it should be withdrawn to enable work to be done on a revised strategy.

3.18 There are several areas in which the evidence base was found to be seriously deficient. In one instance there is a general deficiency while others are more specific. In relation to the general deficiency the problem was that, although the Council decided to extend the time horizon of the strategy to 2021 in accordance with the RSS, the evidence base was inadequate to cover the period until 2021. For retailing, the 2004 Retail Study only looked to 2016. The Inspector thought the evidence base was only robust to 2011. It could not be described as "robust and credible" in supporting the strategy until 2021 and was therefore unsound.

3.19 One of the specific deficiencies identified by the Inspector regards Burntwood. The Core Strategy referred to an area being identified within the West Burntwood Area Action Plan "for provision of a large new centre to meet local needs" and gave a broad indication that the scale of retail development to 2016 in Burntwood could be in the order of 19,000 sq.m. net.

3.20 The level of development proposed at Burntwood would be more than double the threshold of 10,000 sq.m. gross floorspace in PA11 if the 19,000 sq.m. was expressed as gross floorspace. Therefore the size and potential effects of the Burntwood proposal needed to be scrutinised carefully and fully justified by local circumstances. The Inspector thought that a new town centre at Burntwood which was primarily meeting local needs, but exceeded the 10,000 sq.m. threshold would be in conformity with RSS. However a centre over 10,000 sq.m. which was serving a larger catchment would not.

3.21 The 2004 Retail Study and 2005 Responses provide the needs assessments underpinning the Council's proposals. A fundamental issue was the assumption the studies make about trade draw (over and above clawback) from adjoining areas to a new town centre at Burntwood. There was no dispute that seeking to retain about 30-35% of the comparison goods expenditure of Burntwood within the town is a legitimate aim and sensible basis for calculating floorspace requirements (compared with a current retention rate of only about 5%). But about half of the total forecast comparison expenditure used to assess floorspace needs for the new town centre is drawn from the secondary catchments (such as from Brownhills, Norton Canes, Rawnsley and Heath Hayes) all outside Lichfield District. Brownhills and nearby Aldridge are town centres identified in the Walsall UDP which that Council are seeking to support and strengthen.

3.22 In the Inspector's view, this assumption calls into question whether the scale of development being suggested for Burntwood can truly be said to "better meet local needs". He accepted that the potential attraction of a new town centre on adjoining areas should not be ignored and assessing the impact on other centres is vital. But the Retail Studies incorporated trade diversion from the secondary catchments as an early building block in establishing scale, which in the Inspector's view went further than assessing the capacity required to meet the needs generated by Burntwood. A town centre based solely on trade drawn from Burntwood would thus be about half the size suggested in the Retail Studies, but the Inspector recognised that this might not be sufficiently large to achieve the 30-35% retention which is the desirable aim or commercially attractive to the landowner/developer.

3.23 It was undisputed that the proposals for Burntwood would substantially increase the attraction of that centre. The impact on other centres thus needs to be assessed to be consistent with advice in PPS6. The 2005 study made some preliminary assessment of impact on adjoining centres, but suggested "a more in depth study be undertaken to assess the specific trade diversion and implications for the vitality and viability of the (other) centres....this might best be done in the context of an individual application". The Council thought the impact on other centres would not be harmful, but accepted that the impact of any particular scheme would need to be considered in more detail at the application stage.

3.24 The Inspector said that the Core Strategy did not provide the basis for judging the acceptability of impacts on other centres. The larger the new centre, the better it would meet local needs (maximising retention rates from Burntwood), but the greater the impact elsewhere. Accordingly, the Inspector considered that impact needed to be more fully assessed as part of the development plan process rather than being left to an application; this was reinforced by the fact that potential adverse impacts would be on centres outside the District, giving rise to cross boundary issues which are better addressed in the plan-making process.

3.25 The Retail Study highlighted that the extent of impact on other nearby town centres depends not only on the size of floorspace proposed, but also on the mix of retail format (high street/bulky goods). An element of bulky goods retailing was suggested to lessen the potential adverse impact on town centres because trade would be drawn from out of centre retail parks, especially on the edge of Cannock. The Inspector considered that the evidence base was inadequate in relation to impact.

3.26 The Retail Study capacity assessments and the Council's overall approach was broadly supported by London and Cambridge Properties (LCP), the major landowner of the new town centre in Burntwood. Their consultants produced evidence reworking the capacity analysis and indicated a capacity of around 17,000 sq.m. gross by 2011 (20,700 sq.m. if retail warehouse formats were included in the scheme). LCP suggested adopting a phased approach to the development of the town centre with a review after 2011. This is a cautious approach and the Inspector saw merit in adopting a phased approach given the uncertainties associated with planning such a large change in the scale of retailing at Burntwood. But the work by LCP's consultants still assumed a substantial trade draw from the surrounding area.

3.27 The Inspector thought the commercial viability of any proposal was also an important consideration. Viability relates both to the ability of the new centre to attract a good number and variety of retailers and to create sufficient investment confidence for the landowner/developer to proceed with a scheme.

3.28 The Retail Studies referred to the need for a critical mass to achieve the aim of 30% retention and highlighted the lack of investment in the town centre over the years despite planning policies promoting its expansion. But there was no detailed analysis in these studies of what might be the minimum floorspace to achieve a viable scheme. Given the unusual position at Burntwood, where a town centre has to be created from a small retail base yet intended to meet only local needs, the Inspector said that evidence relating to the minimum scale of development to be viable should underpin the Core Strategy. Such evidence, combined with the capacity assessments, would provide a range of possible floorspace for the new centre which could then be tested in relation to impact and sustainability.

3.29 There was thus no proper assessment of minimum market viability underpinning the Core Strategy which the Inspector said was a serious shortcoming in the evidence base which cannot be regarded as "robust and credible". Consequently it must be unsound. It was only after submission of the Core Strategy that the Council commissioned Drivers Jonas to provide an assessment of the appropriate scale of development required to ensure that a town centre proposal for Burntwood is viable, although this was commissioned as part of the evidence base for the West Burntwood Area Action Plan Preferred Options (March 2006).

3.30 The Drivers Jonas report concluded that “in market terms and for Burntwood to achieve sufficient critical mass and truly serve local needs the floorspace retail minimum should be not less than 16,000 sq.m. gross in order to ignite the possibility of development taking place during the plan period”. This assessment was based primarily on expressions of interest from specific retailers for a site in Burntwood, provided that there was a step change in the scale and quality of the centre. The report also emphasised the importance of master-planning the form and layout of such a new centre to ensure that it integrates fully with the existing small centre at Sankey’s Corner and provides the range of formats attractive to interested retailers. In the Inspector’s view, this study was a useful snapshot of market interest, but can only be illustrative of the scale of the centre at the present time since, as the consultants emphasise, retailer interest in a particular location can come and go relatively quickly.

3.31 PPS6 indicates that regard should be given to the accessibility of sites selected for allocation. Whilst this is primarily directed to the accessibility of alternative *sites*, the Inspector thought that given the fundamental change proposed for Burntwood, the accessibility of the new town centre should be assessed as part of the plan making process. The Inspector commented that, because the creation of a large new town centre for Burntwood is predicated on attracting about half its trade from beyond the town, the implications for sustainability need to be examined more closely to ensure that the intended objective of such a centre (to reduce the need to travel) does not have the unintended opposite effect of creating additional car based travel overall.

3.32 The Inspector thought that the new town centre at Burntwood would have good access by road from the edge of the metropolitan area. There is therefore a real possibility that the trade drawn to the new town centre from outside Burntwood would be predominantly car borne. The net result might therefore be a negative effect on the promotion of sustainable travel. This possibility is sufficiently serious to justify more detailed assessment at the plan-making stage.

3.33 The Inspector agreed with the Council that there is no policy reason to limit convenience shopping within the town centre. He accepted that national advice does not distinguish between high street format and bulky goods retailing in town centres but, bearing in mind the differing impact on other centres that might arise from different mixes in format, there may be justification for the policy to refer to a particular mix. This would depend on the conclusions drawn from further evidence.

3.34 The overall view of the Inspector was that the evidence base underpinning the retail proposals was both incomplete and inadequate. A new town centre for Burntwood is a long standing objective of the Council and has strong local support. There is wide acceptance that additional, significant retail development, with a leisure element, is needed to serve the town’s needs. The Inspector endorsed the aim of seeking to enable residents of Burntwood to source a greater proportion of goods and services locally, thus reducing the need to travel. He accepted that a bold and innovative approach may well be needed to secure the desired aim. Development above the thresholds of 10,000 sq.m. and 5000 sq.m. in PA11 may be justified, but the substantial change sought by the Council in the size and attractiveness of the centre required the implications to be fully assessed.

3.35 For the reasons given, the Inspector said that more work was required to assess the impact of the proposal on adjoining centres and on sustainability, primarily the likely net effect on travel by car in the area. The result of this work could identify negative effects of the proposal; this would not necessarily make the proposal for a large new centre unacceptable, but would enable a more explicit balancing of benefits and harm. These issues need to be brought out much more fully and explicitly so that the Council can make an informed choice. The possibility that creating a large new town centre may not be the most sustainable solution should not be ignored.

3.36 The Inspector also said that the further work on impact and accessibility needs to involve more closely the adjoining authorities of Walsall and Cannock Chase since the likely adverse effects of the proposals for Burntwood would be mainly outside Lichfield District. The development of the town centre at Burntwood needs to be much more clearly set within the context of the future role of surrounding centres so that they all are better able to meet local needs.

3.37 Therefore the Inspector regarded the Core Strategy in relation to retailing and leisure in Burntwood as unsound because it would facilitate the construction of a large new centre with no effective check on the size of the centre or on the consequences of the development for other centres nearby or overall travel sustainability. The inadequate evidence base means that these important considerations cannot be properly assessed.

3.38 For the retail element, the suggestion of an upper limit for the scale of growth in comparison goods would provide clearer guidance but in the Inspector's view, there is not the evidence to determine what is an appropriate upper limit. Adopting the suggestion of LCP for development of 17,000 sq.m. gross (high street format) by 2011, with any subsequent growth having to be justified in relation to local needs at that time, would have the benefit of providing a clear ceiling well below that tentatively envisaged in the Core Strategy, but the impact on sustainability and on other centres needs to be more thoroughly considered so that the consequences of even this scale of development fully inform plan-making. The effect of a large new centre at Burntwood on travel patterns also needs to be researched as part of the evidence base for determining the appropriate policy for the Core Strategy. Therefore the Inspector concluded that the Core Strategy's proposals for Burntwood are unsound.

3.39 The Annex to the Inspector's Report deals in Section 5 with Town Centres under the headings Retail Assessments and Lichfield.

Retail Assessments

3.40 The Inspector referred to the Regional Centres Study, March 2006 (RCS) carried out for the RSS. The RCS is concerned with strategic centres in the region and therefore does not refer, or apply, to Burntwood. Nevertheless, the Inspector considered that the underlying economic and retail assumptions in the RCS can be used as a comparative check that the assumptions underlying the retail assessments are reasonable and robust.

3.41 The Retail Studies for the Council give various combinations of floorspace capacity. Assuming a 30% retention of Burntwood's expenditure gives a high street format floorspace of about 17,000 sq.m. in 2011 and about 21,500 sq.m. in 2016;

assuming 35% retention gives floorspace figures of about 18,000 sq.m. and 22,500 sq.m. for these dates. The possible capacity of retail floorspace for Burntwood identified by the Council is thus below the maximum capacity suggested by the studies. All of the assessments of future capacity assume that a permitted extension to the Morrison's foodstore goes ahead (mainly for comparison goods), but not the outline permission for about 6,000 sq.m. on the Olaf Johnson site which would be part of the new town centre.

3.42 The Inspector thought a significant omission in the Retail Studies was any expenditure to *e-tailing* or Internet shopping. Available evidence suggests that Internet shopping will become increasingly significant in the future. Growth in retail expenditure is a major element contributing to future floorspace needs. The Retail Study incorporates a growth rate at the top of the range used in the RCS. Similarly, there are variations in the assumptions for floorspace efficiency increases and existing floorspace turnovers. The figures used in the Retail Study would result in increased estimates of capacity compared with using the assumptions in the RCS. The Inspector thought that the needs assessments presented an optimistic picture of future retail capacity for Burntwood by 2016, with the implications that a greater proportion of trade for the new centre would be drawn from the surrounding area and the impact of the clawback of Burntwood's trade from adjoining centres would be greater if overall growth were to be less than predicted.

Lichfield

3.43 The Core Strategy indicated that Lichfield will be promoted as a strategic centre; will be the focus for major developments of town centre uses; and that redevelopment proposals at Birmingham Road are for mixed use including substantial additional shopping and leisure. The document indicates that the appropriate scale of comparison goods development by 2016 could be in the order of 21,000 sq.m. for Lichfield, based on an assessment in the Retail Study and reflecting Lichfield's role as a strategic centre. The Inspector thought the suggested capacity at 2016 should be regarded as the maximum likely scale of development that should be envisaged. It compares with the conclusions of the Regional Centres Study which indicates a comparison floorspace requirement for Lichfield in a range between 3,000 sq.m. – 9,000 sq.m. sales area by 2021. Policy PA11 of the RSS identifies Lichfield as a strategic centre which should be the focus for major retail developments of more than 10,000 sq.m. *gross* floorspace.

3.44 The indicative scale of development in Lichfield would result in a doubling of non-convenience floorspace in the town. But in the Inspector's view, this would not substantially increase the attraction of the centre in a regional or sub regional context. Lichfield is by far the smallest of the strategic centres identified in PA11 and primarily serves Lichfield District. The scale of provision in Lichfield does not rely on attracting a substantial proportion of trade from outside the District or other centres, but increased retention from residents of Lichfield and surrounding wards in the District. The scale of the development should increase the attractiveness of the centre for residents of the District, but not significantly change its relationship with other strategic centres. The Birmingham Road area is in the most sustainable part of the town centre to accommodate major growth.

3.45 PPS6 indicates that LPAs should consider setting an indicative upper limit for the scale of developments likely to be permissible in different types of centre (paragraph 2.42). The Inspector considered that this would be the preferable approach for the Core Strategy, giving greater clarity, but he considered that it was not essential in relation to

Lichfield. The Inspector saw nothing leading to fundamental unsoundness in the approach set out for Lichfield town centre.

3.46 Regarding the scope for retail warehousing at Eastern Avenue in Lichfield, the Inspector noted the planning consent granted at Eastern Avenue and noted that there was further interest in this type of development in same area. But it is not the role of the Core Strategy to identify particular sites for different land uses. The Council accepted that it is difficult to accommodate bulky goods retailing within the city centre. The Inspector did not think the Core Strategy failed any test of soundness in its brief references to bulky goods retailing and therefore there was no need for any changes in the references to further endorse Eastern Avenue as the location for bulky goods development.

Core Strategy Preferred Options

3.47 The Core Strategy Preferred Options Report was published for consultation in November 2008. The development strategy presented in the Core Strategy Preferred Options Report is to focus development on the two main settlements in the District, Lichfield City and Burntwood and to a lesser extent on key sustainable settlements in the District. The Preferred Options report gives some consideration to cross-boundary issues. A key part of the proposed spatial strategy is development to meet the needs of neighbouring Tamworth and Rugeley.

3.48 The proposed development strategy clearly sets out where housing and retail growth should be located. In Lichfield the additional comparison retail floorspace requirement is 25,000 sq.m. gross up to 2021 and 35,000 sq.m. gross up to 2026. The Friarsgate scheme will account for the majority of the comparison goods requirement up to 2021. Development within Burntwood will be focused on developing the town centre to meet local needs. A key proposal for Burntwood in the Core Strategy is 17,000 sq.m. of gross retail floorspace to 2021. This includes commitments (LCP scheme) and the potential for further retail development on the Olaf Johnson site.

3.49 In its comments to Lichfield District Council on the Core Strategy Preferred Options in January 2009, the Government Office for the West Midlands has said that the level of retail development in Burntwood needs to be justified. RSS Preferred Option Policy PA11 states that the network of town and city centres should be the preferred location for major retail developments, where the comparison retail element exceeds 10,000 sq.m. gross. GOWM notes that the RSS Preferred Option requires justification for increases in comparison shopping floorspace over 10,000 sq.m. outside of the Region's non-strategic centres. GOWM suggests a split between convenience and comparison floorspace.

3.50 The West Midlands Regional Assembly has also commented that the RSS does not include any specific proposals for the level of retail provision at Burntwood which falls outside the network of strategic centres. Developments outside the strategic network of centres are not anticipated to be for more than 10,000 sq.m. Significant additional floorspace is proposed at Burntwood in excess of the 10,000sq.m. gross threshold referred to in Policy PA11.

3.51 In relation to Burntwood, the Assembly comments that it would be helpful if the policy clarified how much additional comparison retail floorspace is proposed, and made it clear that the allocations cover the whole plan period (i.e. to 2026) even though the retail assessment only looks to 2021. Any allocations above 10,000 sq.m. should be clearly justified in terms of policy PA12B. The key issue here is whether the proposal would have an adverse impact on or put at risk the delivery of development within a strategic centre - in this case key centres to consider are Cannock, Lichfield and Walsall.

3.52 In their comments on the Core Strategy Preferred Options Report, Cannock Chase Council supports the development of Burntwood town centre where it can be demonstrated that this is necessary to meet local needs without having a detrimental effect on the viability of neighbouring towns like Cannock. The Council regards the mixed use proposals and role of Burntwood town centre to meet local needs as sensible proposals to ensure sustainability and stability for Burntwood. It does not support a large scale expansion of the town centre.

3.53 Walsall Council have commented on retail provision in Lichfield city centre and in Burntwood. In relation to Lichfield the only comment is on the reference to around 25,000 sq.m. gross of comparison goods floorspace proposed for Lichfield. Walsall Council comment that any increase above 25,000 sq.m. before 2021 would require strong justification in the context of the RSS. However, it is noted that the Preferred Options consultation refers generally to the period to 2026, which is consistent with the RSS Phase 2 Revision.

3.54 In relation to retailing in Burntwood, Walsall Council has no objection to the scale of additional convenience goods provision, based on the permitted expansion of Morrisons and a discount foodstore. However it is concerned about the amount of comparison floorspace proposed. The Core Strategy Preferred Option proposes the development of a total of 17,000 sq.m. gross floorspace up to 2021 in Burntwood, of which up to 14-15,000 sq.m. would be for comparison goods. The retail capacity for this scale of floorspace relies partly on an increase of trade drawn from the Walsall (Aldridge & Brownhills) and Cannock areas. Walsall Council agrees that Burntwood should meet local needs but that it is inappropriate to consider parts of Walsall and Cannock as within Burntwood's catchment. It suggests that the retail capacity calculations should be re-worked to exclude any reliance on increased trade from the Walsall and Cannock areas, although it recognises that the effect of doing so would be offset to some degree if the timescale for a revised assessment were to be extended to 2026.

Issues to be addressed in the Evidence Base

3.55 Taking on board the Inspector's findings, in relation to the evidence base for shopping policy in the LDF Core Strategy, this report seeks to advise the Council on:

- Policy regarding future retail development in Lichfield city centre in the light of RSS Policies PA11 and PA12A and the approval of a comprehensive redevelopment scheme at Birmingham Road (Friarsgate scheme).
- Policy regarding future retail development in Burntwood town centre in the light of RSS draft Policies PA11 and PA12B.
- The appropriate scale of development in Lichfield and Burntwood centres in the light of the RSS policies.
- Policy regarding neighbourhood shopping centres and village shops.
- Rectifying deficiencies in the evidence base so that the shopping policies are fully justified.

- The capacity for future retail development, extending the time horizon to 2026 and using gross as well as net floorspace.
- The sensitivity of the assessment of quantitative need, taking account of the rate of expenditure growth, the growth of Internet shopping and assumptions in the Regional Centres Study.
- The appropriate scale of retail development in Burntwood in the longer term taking account of the extent of trade draw from outside Lichfield District.
- The implications of an expanded town centre in Burntwood in terms of impact on the vitality and viability of surrounding centres, within and outside the District.
- Issues of commercial viability of future retail development in Burntwood.
- The implications of future retail development in Burntwood in terms of overall travel sustainability.
- Indicative upper limits for the scale of development in different types of centre.
- The role and hierarchy of centres within the District, including local centres and the need for any new centres.

3.56 An assessment of the vitality and viability of Lichfield city centre and Burntwood town centre is included in Appendix 11 of this report.

Summary of the Strategic Policy Context

3.57 The RSS identifies Lichfield as a strategic centre in the retail hierarchy. Strategic centres should be the focus for major comparison goods retail development of more than 10,000 sq.m. gross floorspace. Burntwood is a non-strategic centre which should meet local needs. Proposals for more than 10,000 sq.m. gross comparison goods floorspace in Burntwood need to be justified by supporting evidence.

3.58 In the Core Strategy Preferred Options the indicative scale of comparison goods provision in Lichfield is 25,000 sq.m. gross in 2021 and 35,000 sq.m. gross in 2026. In Burntwood the key issue is the extent to which new retail development would draw trade from beyond the Burntwood urban area, which may be considered in excess of local needs. This report seeks to provide a robust evidence base to support an appropriate scale of retail development in Burntwood and to demonstrate the future role of Burntwood town centre. It takes account of the Inspector’s comments in the July 2006 Examination report and the responses to the consultation on the Preferred Options.

4. ROLE AND HIERARCHY OF CENTRES

4.1 The Background Retail Review gives details of existing shopping provision in Lichfield District and contains health checks of Lichfield and Burntwood centres. In this Section we set out profiles of the main centres as a basis for assessing their role and their position in the retail hierarchy of centres. Reporting on the Examination of the LDF Core Strategy the Inspector said that the Core Strategy should set out a hierarchy of centres, based on clear criteria and research, including the identification of local centres and the need for new centres in some locations. Advice is given on the retail hierarchy.

Profiles of Centres in the District

Lichfield

4.2 Lichfield city centre is the largest centre in the District with a total shopping floorspace of 30,800 sq.m. (gross) contained within a total of 161 retail units. The proportion of comparison goods shops in the centre is slightly higher than the national average but the proportion of convenience goods shops is below the national average. Most of the convenience goods shopping provision is located outside the city centre in edge-of-centre and out-of-centre foodstores. Most of the comparison goods shopping provision is located within the city centre. There is only a limited amount of edge-of-centre and out-of-centre retail warehouse floorspace.

4.3 Despite recent shopping centre improvements and the diversity of town centre uses, the city centre is ranked bottom out of 25 regional strategic centres in the West Midlands. In the West Midlands Regional Centres Study Lichfield was considered to be vulnerable due to the lack of development of any material scale in or adjacent to the centre in recent years, which means that the gap between Lichfield and other strategic centres that have benefited from development, has widened. Other than the Friarsgate redevelopment scheme, Lichfield is one of the centres considered to the most constrained in terms of physical capacity for retail development in the historic city centre.

4.4 The overall level of vitality and viability obtained on the health check appraisal for Lichfield is above average. The health check (updated in February 2009) is included in Appendix 11 and summarised in paragraph 6.5. Lichfield’s main strengths are the small amount of floorspace outside the centre; the capacity for growth and change in the centre; a good diversity of main town centre uses; generally good retailer representation; low vacancies; improving commercial performance; high volume of pedestrian flow; high level of accessibility; safety and security; and high environmental quality including a very good pedestrian environment and quality of open spaces and landscaping. The centre does not have any notable weaknesses. The vitality and viability of the centre is relatively strong and it will improve even further when the Friarsgate redevelopment scheme takes place.

LICHFIELD

	Comparison Goods	**Convenience Goods**
City Centre	50% of retail & commercial properties (GB average 48%) 17,030 sq.m. net floorspace 36 national multiples. No department stores.	5% of retail & commercial properties (GB average 9%) 2,770 sq.m. net floorspace
Edge of Centre	3,467 sq.m. net	2,598 sq.m. net
Out of Centre	2,359 sq.m. net	5,446 sq.m. net
Local Shops	350 sq.m. net (estimated)	350 sq.m. net (estimated)
Benchmark Turnover City Centre	£67.16m	£10.32m
Turnover Beyond City Centre	£13.91m	£58.20m
Total Turnover	£81.07m	£68.52m
Vitality and Viability Index	3.7	

Burntwood

4.5 Burntwood town centre comprises a grouping of shops at Sankey's Corner (including a Tesco supermarket) and a Morrisons superstore which is physically separated from the other shops in the centre. The centre comprises a total shopping floorspace of 6960 sq.m. (gross) contained within a total of 23 retail units. The proportion of comparison goods shops in the centre is significantly less than the national average, but the proportion of convenience goods shops is higher than the national average. Beyond the centre, there is additional mostly convenience goods provision in the local centres. Morrisons has the largest proportion of both convenience and comparison goods turnover. Only 18% of total turnover in the centre is in comparison goods.

4.6 Burntwood currently functions as a district centre and is successful in fulfilling a convenience shopping role, well served by public transport, with few vacant units. However, its role suffers from a limited range of shops and a high leakage of trade to other centres. A significant opportunity exists to increase the critical mass of shopping in the centre, improved its retail offer and provide a more recognisable and consolidated town centre.

4.7 The overall level of vitality and viability obtained on the health check appraisal for Burntwood is just above average. The health check (updated in February 2009) is included in Appendix 11 and summarised in paragraph 7.14. Burntwood's main strengths are the lack of floorspace outside the centre; the capacity for growth and change in the centre; sports and leisure facilities; the availability of food shopping; lack of charity shops; lack of vacancies; availability of car parking; good public transport. Its main weaknesses are in terms of the limited range of shops; low retailer demand; high leakage of trade and a generally poor shopping environment. Burntwood is a centre in need of improvement. It needs to have an improved retail offer and a consolidation of its retail provision to increase the critical mass of shopping in the centre.

BURNTWOOD

	Comparison Goods	**Convenience Goods**
City Centre	29% of retail & commercial properties (GB average 48%) 1,589 sq.m. net floorspace 4 national multiples.	13% of retail & commercial properties (GB average 9%) 3,081 sq.m. net floorspace
Local Shops	1,250 sq.m. net (estimated)	1,626 sq.m. net (estimated)
Benchmark Turnover Sankey's Corner	£5.36m	£24.68m
Turnover Beyond Centre	£2.23m	£5.89m
Total Turnover	£7.59m	£30.57m
Vitality and Viability Index	3.3	

Local Centres

4.8 Outside Lichfield and Burntwood centres, there are 14 local and village centres. The number of units in these centres is summarised below.

Local Centre	Convenience	Comparison	Service	Vacant	Other	Total
Lichfield						
Boley Park	2	2	4	-	1	9
Curborough	3	2	3	-	-	8
Netherstowe	1	0	6	-	1	8
Weston Road	1	3	3	1	-	8
Burntwood						
Chasetown	4	13	17	3	3	40
Morley Road	2	3	8	-	-	13
Parkhill Road	2	2	5	-	-	9
Swan Island						
Villages						
Alrewas	3	4	11	2	-	20
Armitage	3	4	3	-	2	12
Fazeley	1	3	8	-	-	12
Shenstone	3	3	6	-	2	14
Stonnal	1	4	3	-	-	8
Whittington	1	3	6	-	1	11

Advice on the Hierarchy of Centres

4.9 PPS6 provides advice in relation to the development of the network and hierarchy of centres, at the regional and local level. Local authorities must plan carefully how to distribute any identified growth at both regional and local levels. Any change in the role and function of centres – upward or downward – must come through the development plan process, rather than through planning applications, with higher order centres dealt with in the RSS and with lower order centres dealt with through the development plan documents.

4.10 LPAs should adopt a positive and proactive approach to planning for the future of all types of centres within their areas. The LDF Core Strategy should set out a spatial vision and strategy for the network and hierarchy of centres, including local centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area.

4.11 Lichfield is clearly the dominant centre in Lichfield District. It is the largest centre by a considerable margin, more than four times as large as Burntwood. Lichfield is a strategic centre, one of the network of 25 town and city centres identified in RSS Policy PA11. The RSS does not set out a formal hierarchy of roles for the centres, other than identifying Birmingham as the regional capital. Instead the role of the centres is meant to be complementary. Policy PA11 seeks to ensure that the network of 25 strategic town and city centres is the focus for major new retail developments

4.12 The adopted Staffordshire and Stoke-on-Trent Structure Plan 1996-2011, defines a hierarchy of centres in the Plan area. The Plan states that this hierarchy should be borne in mind in preparing strategies and policies for these centres. Local plans should analyse the present and future role of each main centre in their area in a manner which takes into account the ramifications of proposals for development on the vitality and viability of other centres.

4.13 In the hierarchy defined in the Structure Plan, Lichfield is classed as a Large Town Centre. Although culturally a “city centre”, in PPS6 terms Lichfield is a “town centre” at the second level of centres after city centres and is the principal centre in the local authority area. We agree that Lichfield functions as a Large Town Centre and is a strategic centre in the regional and sub-regional retail hierarchy. This role should be confirmed in the LDF Core Strategy.

4.14 In the hierarchy defined in the Structure Plan, Burntwood is classed as a Smaller Town Centre. The Structure Plan notes that Burntwood centre is in need of further expansion and upgrading. It is not sufficient to meet the requirements of its catchment population and it would benefit from further investment.

4.15 At present Burntwood functions as a “district centre” In PPS6 terms, comprising a group of shops containing at least one supermarket or superstore and a range of non-retail services such as banks, building societies and restaurants, as well as local public facilities such as a library.

4.16 We believe that there is scope for Burntwood to expand as a Smaller Town Centre to improve its retail offer but to maintain its status in the retail hierarchy. It does not have the potential to become a Large Town Centre like Lichfield, but it could expand further. The planning consent for the LCP development scheme on the Hoardings site will represent a significant expansion of the centre in the short term and there may be potential for further expansion in the longer term. The extent of any further expansion is discussed in Section 7 of this report.

4.17 PPS6 defines Local Centres as including a range of small shops of a local nature, serving a small catchment and typically including a small supermarket, a newsagent, a sub post office, a pharmacy and services such as a hot-food takeaway and a launderette. In rural areas, large villages may perform the role of a local centre.

4.18 Our assessment of shopping and service provision in the local centres in Lichfield District is that Chasetown is significantly larger in scale than the other local centres, but it does not function as a district centre. The other local centres are smaller and similar in size, with a limited provision of shops and services and a localised role. Of the village centres, Alrewas has the largest number of retail and service units but with a high proportion of service uses. Our advice is that in the retail hierarchy for Lichfield District Chasetown should be identified as a Large Local Centre and the other centres should be identified as Smaller Local Centres or Village Centres.

4.19 Therefore, our advice is that the hierarchy of centres in Lichfield District should be defined as follows.

Large Town Centre	Lichfield
Smaller Town Centre	Burntwood
Large Local Centre	Chasetown
Smaller Local Centres	Boley Park, Curborough, Netherstowe, Weston Road (Lichfield); Morley Road, Parkhill Road, Swan Island (Burntwood)
Village Centres	Alrewas, Armitage, Fazeley, Shenstone, Stonnal, Whittington

5. NEED ASSESSMENT

5.1 In the Background Retail Review a capacity analysis was undertaken to 2011 and 2012 for convenience and comparison goods in the Lichfield and Burntwood catchment areas and for bulky goods in the Lichfield catchment area. For the purposes of the present report it is necessary to extend the time horizon of the need assessment for the LDF Core Strategy to the year 2026. Therefore this Section outlines the basis for an extended capacity analysis for the Lichfield and Burntwood catchments to 2016, 2021 and 2026. The starting point is the forecasts of population and expenditure in the Lichfield study area.

Population and Expenditure

Population

5.2 Population forecasts for Lichfield District as a whole have been updated and extended to 2026 using the latest ONS 2006-based projections for local authority areas published by Staffordshire County Council in June 2008. The distribution of population growth between zones in Lichfield District is based on the allocations of housing growth in the LDF Preferred Options. It takes account of the preferred distribution of new housing in Lichfield, Burntwood and other key settlements, as follows.

Zone	% of District Total	Notes on Distribution
Burntwood wards	12.5%	-
Lichfield wards	50%	-
Northern Rural wards	14.5%	mostly in Rugeley suburbs (Colton and Mavesyn Ridware)
Eastern Rural wards	14%	mostly in Fradley and Alrewas
Southern Rural wards	9%	mostly in Tamworth suburbs (Fazeley ward)

5.3 In the Cannock Chase District wards within the study area the extent of population growth is in line with the latest Staffordshire CC projections. In the Walsall District wards within the study area the extent of population growth is in line with the ONS 2006-based projections for Walsall District as a whole.

5.4 The population forecasts by ward have been aggregated into zones. The population projections by zone and ward are shown in detail in Appendix 1. The zone totals are summarised below.

Population by zone	2006	2011	2016	2021	2026
Burntwood wards	30,416	30,891	31,366	31,854	32,279
Lichfield wards	29,136	31,036	32,936	34,886	36,586
Northern Rural wards	10,733	11,284	11,835	12,400	12,893
Eastern Rural wards	11,832	12,364	12,896	13,442	13,918
Southern Rural wards	14,583	14,925	15,267	15,618	15,924
Walsall District wards	25,092	25,408	25,812	26,236	26,620
Cannock Chase District wards	23,985	24,748	25,537	26,300	26,935
Study Area Total	145,777	150,656	155,649	160,736	165,155

Per Capita Expenditure

5.5 We have adopted the base data on per capita expenditure by ward from the 2004 Retail Study. It is still valid data and it represents a detailed and accurate picture of local expenditure. For consistency with the Retail Study we have retained the 2001 price base. The 2001 base data on per capita expenditure by ward and zone are shown in Appendix 2, excluding special forms of trading. Projections have been made of per capita expenditure in 2006 and in the forecast years of 2011, 2016, 2021 and 2026 for convenience goods (Appendix 2A) and comparison goods (Appendix 2B). The projections are based on the latest forecasts in MapInfo Information Brief 08/2 (September 2008) using the OEF forecasts from the UK consumer spending model. The annual growth rates are as follows:

Convenience goods	Comparison goods
2006-2008: forecast growth 2.2% p.a.	2006-2008: forecast growth 5.4% p.a.
2008-2011: forecast growth 1.5% p.a.	2008-2011: forecast growth 3.8% p.a.
2011-2016: forecast growth 1.5% p.a.	2011-2016: forecast growth 3.8% p.a.
2016-2026: forecast growth 1.5% p.a.	2016-2026: forecast growth 4.0% p.a.

5.6 It is necessary to exclude special forms of trading from the forecasts of per capita expenditure. MapInfo data shows that special forms of trading represents 1.5% of expenditure on convenience goods and 7.0% of expenditure on comparison goods in 2001. There is no more recent advice from MapInfo on likely future changes in special forms of trading as a result of Internet shopping. Therefore we have adopted the latest Experian forecasts of special forms of trading (non-store sales) as shown below.

Special forms of trading	2001	2004	2006	2011	2016	2021	2026
Convenience goods	1.5%	2.5%	3.4%	7.3%	8.1%	8.6%	9.1%
Comparison goods	7.0%	7.1%	8.3%	13.4%	13.9%	13.9%	13.9%

Total Expenditure

5.7 The tables in Appendix 3 show forecasts of total expenditure in the study area by ward and zone in convenience goods (Appendix 3A) and comparison goods (Appendix 3B), excluding special forms of trading. We have multiplied the population in each ward by the per capita expenditure in each ward for convenience and comparison goods separately and aggregated them by zone. The forecasts are summarised below by zone.

Convenience Goods Expenditure by zone	**2006 £m**	**2011 £m**	**2016 £m**	**2021 £m**	**2026 £m**
Burntwood wards	51.08	54.38	58.97	64.16	69.66
Lichfield wards	48.28	53.91	61.09	69.33	77.90
Northern Rural wards	18.34	20.20	22.62	25.39	28.28
Eastern Rural wards	20.36	22.28	24.81	27.70	30.72
Southern Rural wards	24.68	26.47	28.91	31.67	34.53
Walsall District wards	42.51	45.12	48.95	53.31	57.95
Cannock Chase District wards	40.20	43.47	47.91	52.86	58.01
Study Area Total	245.46	265.83	293.27	324.44	357.05

Comparison Goods Expenditure by zone	**2006 £m**	**2011 £m**	**2016 £m**	**2021 £m**	**2026 £m**
Burntwood wards	84.31	100.47	122.22	151.01	186.18
Lichfield wards	81.56	101.94	129.60	167.02	213.10
Northern Rural wards	31.25	38.54	48.40	61.68	78.00
Eastern Rural wards	35.53	43.54	54.37	68.92	86.79
Southern Rural wards	42.05	50.46	61.81	76.88	95.17
Walsall District wards	68.98	81.96	99.75	123.36	152.28
Cannock Chase District wards	67.51	81.73	101.04	126.60	157.75
Study Area Total	411.19	498.63	617.20	775.47	969.27

5.8 In convenience goods the forecast growth of expenditure in the study area between 2006 and 2026 is £115.6m or 45%. In comparison goods the forecast growth of expenditure in the study area between 2006 and 2026 is £558.1m or 135%.

Capacity Analysis to 2026

Methodology

5.9 The capacity analysis comprises a number of steps which are outlined below.

Catchment Area Expenditure

5.10 In the Background Retail Review we advised that the most realistic catchment areas for Lichfield and Burntwood should be defined as follows:

- Lichfield's catchment area includes a primary catchment comprising the 6 Lichfield wards and a secondary catchment comprising the remainder of Lichfield District. The overall catchment is defined as Lichfield District. There will be a small inflow of trade into the Lichfield catchment area from outside the District.
- Burntwood's catchment area includes a primary catchment comprising the 8 Burntwood wards and a secondary catchment comprising the wards in Cannock Chase and Walsall Districts that are included within the wider study area. There will be a small inflow into the Burntwood catchment from Lichfield and the northern and southern rural zones.

5.11 In the capacity analysis the expenditure estimates and forecasts for these primary and secondary catchments are combined to give total expenditure for the Lichfield and Burntwood catchment areas for convenience and comparison goods.

Turnover

5.12 The household survey carried out by NEMS for GL Hearn enables survey-based estimates to be made of existing convenience and comparison goods turnover in each catchment area. The 2004 base year figures of turnover are derived from the Retail Study. The approach used is to compare the expenditure in each catchment area with the turnover in Lichfield and Burntwood. Turnover estimates have been made for 2006 by assuming that turnover has increased in line with the growth of expenditure in each catchment area between 2004 and 2006, and by allowing for the new Waitrose store in Lichfield in 2006 (see paragraph 5.16).

Leakage of Trade and Potential for Clawback

5.13 The difference between expenditure and turnover in the Lichfield and Burntwood catchment areas represents net leakage from these catchment areas. It is a net figure because there will be inflows and outflows of expenditure. The ratio of turnover to expenditure for each catchment area is the retention level. Retention levels have been calculated for the primary and secondary catchments in 2004 and 2006. Judgements have been made about the likely increase in retention levels up to the forecast years of 2011, 2016, 2021 and 2026. These increases are shown below.

Retention Levels, Convenience Goods	**2006 %**	**2011 %**	**2016 %**	**2021 %**	**2026 %**
Lichfield catchment area					
primary catchment	87	90	94	94	94
secondary catchment	27	30	30	30	30
overall retention level	45	48	50	50	52
Burntwood catchment area					
primary catchment	50	55	55	55	55
secondary catchment	4	5	5	5	5
overall retention level	22	24	24	24	24

Retention Levels, Comparison Goods	**2006 %**	**2011 %**	**2016 %**	**2021 %**	**2026 %**
Lichfield catchment area					
primary catchment	45	60	65	65	65
secondary catchment	23	30	35	35	35
overall retention level	29	39	44	45	45
Burntwood catchment area					
primary catchment	5	30	30	30	30
secondary catchment	2	4	4	4	4
overall retention level	3	14	14	14	14

Retention Levels, Bulky Goods	**2006 %**	**2011 %**	**2016 %**	**2021 %**	**2026 %**
Lichfield catchment area					
overall retention level	17	20	20	20	20

5.14 The main assumptions about increases in retention levels are that:

- In the Lichfield catchment area there is potential for a moderate increase in the convenience goods retention level mostly because of current commitments for new foodstores.
- In the Lichfield catchment area there is potential for a moderate increase in the comparison goods retention level mostly because of the Friarsgate scheme in Lichfield and the LCP scheme commitment in Burntwood. There is also a potential for a moderate increase in the bulky goods retention level.
- In the Burntwood catchment area there is potential for a small increase in the convenience goods retention level mostly because of the Morrisons extension.
- In the Burntwood catchment area there is potential for a significant increase in

the comparison goods retention level because of the LCP scheme commitment and other development opportunities in the town centre.

Expenditure Capacity

5.15 Applying the percentage retention levels to the expenditure forecasts for the primary and secondary catchment areas provides estimates of the expenditure retained in Lichfield and Burntwood in 2011, 2016, 2021 and 2026. The projected future turnover in each centre is then subtracted from this total of expenditure retained. Future turnover is estimated by allowing for a growth in sales productivity using annual growth rates of 0.6% for convenience goods and 2.2% for comparison goods. These are the latest growth rates forecast by Experian. The difference between expenditure retained and future turnover is the surplus expenditure capacity.

Recent Developments and Commitments

5.16 We have included the recently built Waitrose supermarket at Walsall Road in Lichfield in our turnover estimates for 2006 because it opened in 2006. In the absence of survey data we assume that the Waitrose store is trading at its company average turnover level with an estimated convenience goods turnover of £17.8m in 2001 prices. We also assume that 50% of its turnover is drawn from clawback of leakage and 50% is trade diverted from existing stores in Lichfield. On that basis the additional turnover drawn from within the Lichfield catchment in 2006 is estimated to be £8.9m.

5.17 Allowance must be made for existing commitments, that is retail developments that already have planning consent. These include:

- the extension to the Morrisons store in Burntwood (for both convenience and comparison goods)
- the Friarsgate redevelopment scheme in Lichfield city centre (principally for comparison goods)
- the out-of-centre retail warehouse development at Eastern Avenue/Vulcan Road, Lichfield (bulky comparison goods)
- the replacement Tesco store in Lichfield, and
- the London & Cambridge Properties non-food retail development at Burntwood (comparison goods).

5.18 We have estimated the turnover of these schemes based on their net sales areas and estimates of turnover per sq.m. from the relevant retail statements. We assume that all the commitments will have been built by 2011 except for the Friarsgate scheme which we assume will not be completed until after 2011 but will be trading by 2016.

Results of the Capacity Analysis

5.19 The long term capacity analysis tables are shown in Appendix 4. The relevant tables are:
Appendix 4A – Convenience goods, Lichfield catchment area
Appendix 4B – Convenience goods, Burntwood catchment area
Appendix 4C – Comparison goods, Lichfield catchment area
Appendix 4D – Comparison goods, Burntwood catchment area
Appendix 4E – Bulky goods, Lichfield catchment area

5.20 Capacity is summarised below.

Capacity (£ million)	2011	2016	2021	2026
Convenience Goods				
Lichfield	-0.32	0.28	9.14	15.42
Burntwood	1.85	3.81	6.11	9.54
Comparison Goods				
Lichfield	-10.92	-33.61	-9.28	23.39
Burntwood	0.02	3.81	9.71	12.70
Bulky Goods				
Lichfield	-0.79	1.76	5.74	10.91

5.21 In convenience goods there is very little capacity for additional development in Lichfield up to 2016, after allowing for the replacement Tesco foodstore, and there is a moderate capacity for further convenience goods shopping in the longer term. In Burntwood there is a smaller capacity after allowing for the Morrisons extension. There is a potential for further convenience goods floorspace in Burntwood after 2011.

5.22 In comparison goods there is a negative capacity for additional development in Lichfield up to 2021 because the available capacity is taken up by the commitment for the Friarsgate redevelopment scheme in Lichfield. There is predicted to be a surplus capacity in 2026 to support further comparison goods development. There is no capacity for additional comparison goods development in Burntwood until after 2011 because of the committed LCP scheme. There is a small surplus capacity in the longer term. There is a small capacity for additional bulky goods development in Lichfield from 2016 onwards.

Floorspace Capacity

5.23 The long term capacity forecasts have been used to estimate floorspace capacity in Lichfield and Burntwood up to 2026. As recommended by the Inspector at the LDF Core Strategy Examination, retail need in terms of floorspace capacity is expressed as gross as well as net floorspace in order to represent the overall physical scale of development that needs to be accommodated.

5.24 A range of sales densities has been applied to the capacity forecasts. For convenience goods the range is £4,000 to £11,000 per sq.m. net in 2006. The upper figure of £11,000 per sq.m. is an average for main foodstore operators and the lower figure of £4,000 per sq.m. net is an average for discount foodstores. In convenience goods an allowance is made for growth in sales density of 0.6% p.a.

	Range of sales per sq.m. net	
2006	£4,000	£11,000
2011	£4,121	£11,334
2016	£4,247	£11,678
2021	£4,376	£12,033
2026	£4,508	£12,398

5.25 In comparison goods a lower initial sales density is used, based on the existing average for Lichfield city centre of about £4,000 per sq.m. net derived from the GL Hearn Retail Study. An upper figure of £5,700 per sq.m. net is used, based on the turnover for Lichfield city centre shown in the West Midlands Regional Centres Study. In comparison goods an allowance is made for growth in sales density of 2.2% p.a. Therefore for comparison goods the sales densities are as follows:

	Range of sales per sq.m. net	
2006	£4,000	£5,700
2011	£4,460	£6,355
2016	£4,972	£7,086
2021	£5,544	£7,900
2026	£6,181	£8,808

5.26 In the case of bulky goods no range is adopted because it is commonly accepted that the average sales density for bulky goods retail warehouses is around £2,500 per sq.m. net. Again an allowance is made for a growth in sales density of 2.2% p.a. Therefore for bulky goods the sales densities are as follows:

	Sales per sq.m. net
2006	£2,500
2011	£2,787
2016	£3,108
2021	£3,465
2026	£3,863

5.27 Details of the floorspace capacities based on these sales densities are shown in Appendix 5. The approach used is to take the residual capacities (after allowing for commitments) calculated in Appendix 4 and to apply the range of sales densities shown above to calculate net floorspace. Gross floorspace is then estimated by applying typical net/gross floorspace ratios of 70% for convenience and comparison goods and 80% for bulky goods. Details are shown in Appendix 5A for convenience goods, Appendix 5B for comparison goods and Appendix 5C for bulky goods. The gross floorspace capacity is summarised below. The range reflects the application of a range of sales densities. The figures in the table are rounded for simplicity.

Floorspace Capacity (sq. metres gross)	**2011**	**2016**	**2021**	**2026**
Convenience Goods				
Lichfield	nil	30 - 90	1,100 - 3,000	1,800 – 4,900
Burntwood	200 - 600	500 -1,300	700 - 2,000	1,100 - 3,000
Comparison Goods				
Lichfield	nil	nil	nil	3,800 - 5,400
Burntwood	nil	800 - 1,100	1,800 - 2,500	2,100 – 2,900
Bulky Goods				
Lichfield	nil	700	2,100	3,500

5.28 In convenience goods it should be emphasised that the higher figures represent a situation in which all the capacity is taken up by discount foodstores, which is very unlikely. The capacity is more likely to be at the lower end of the range and it implies that there is very little floorspace capacity for additional convenience goods. In Lichfield there is potential in the longer term for an additional foodstore or an extension of one of the existing foodstores. In Burntwood (after allowing for the Morrisons extension) there is potential in the longer term for another supermarket or a discount foodstore. However, the Morrisons extension will be sufficient to meet convenience shopping needs in the short term.

5.29 In comparison goods there is no capacity for additional development in Lichfield until after 2021 because of the major commitment at Friarsgate. The surplus capacity in 2026 could be met by further redevelopment in the city centre. Section 6 of this report considers the potential for additional retailing to be accommodated in Lichfield city centre. There is a limited capacity for additional comparison goods development in Burntwood in 2016 and a greater floorspace capacity from 2021 onwards. Section 7 of this report considers how this additional floorspace capacity could be met in Burntwood.

5.30 In bulky goods there is a limited floorspace capacity for additional bulky goods development in Lichfield until 2021. In the longer term capacity would exist after the development of the Vulcan Road scheme, sufficient to support another relatively small scale retail warehouse development, of a similar size to that approved at Vulcan Road.

Sensitivity of the Need Assessment

5.31 The sensitivity of the need assessment has been tested using a range of assumptions on:

- retail expenditure growth
- retention levels
- increases in floorspace efficiency, and
- implications of the growth of Internet shopping in the longer term

5.32 These assumptions represent a range of scenarios to be applied as alternatives to the main capacity analysis presented earlier. The scenarios are discussed below.

Retail Expenditure Growth

5.33 In convenience goods sensitivity in the annual rate of expenditure growth is tested. In the main forecast the annual growth rate for convenience goods over the longer term is 1.5% p.a. As an alternative we take a lower growth rate of 1.0% p.a., within the range of the short term to medium term trend projections made by MapInfo in Information Brief 08/2. In comparison goods we allow for the possibility of a higher annual growth rate of 5.0% from 2006, compared with 3.8% to 2016 and 4.0% to 2026 in the main forecast. A growth rate of 5.0% p.a. was forecast by GL Hearn in the 2004 Retail Study and it is consistent with the long term growth trend projected in MapInfo Information Brief 08/2.

Future Retention Levels

5.34 In convenience goods a possible increase in retention levels is assumed for the primary catchment areas of Lichfield and Burntwood. In the Lichfield primary catchment area a future retention level of 95% is tested (compared with 94% in the main forecast). In the Burntwood primary catchment area a future retention level of 70% is tested (compared with 55% in the main forecast).

5.35 In comparison goods a possible increase in retention levels is also assumed for the primary catchment areas of Lichfield and Burntwood. In the Lichfield primary catchment area a future retention level of 70% is tested (compared with 65% in the main forecast). In the Burntwood primary catchment area a future retention level of 35% is tested (compared with 30% in the main forecast).

Floorspace Efficiency

5.36 In convenience goods no sensitivity is assumed in the increase in floorspace efficiency (sales productivity) in the main forecast of 0.6% p.a. Any small variation in this assumption would not have a significant effect on the capacity forecasts. In comparison goods we allow for the possibility of an increase in sales productivity of 2.8% p.a. (compared with 2.2% in the main forecast). This higher figure is a possibility suggested by Experian that would be consistent with a higher growth of comparison goods expenditure.

Internet Shopping

5.37 In convenience goods no sensitivity is assumed in the assumptions on expenditure in special forms of trading including Internet shopping. In comparison goods we have used the following assumptions about the percentage of special forms of trading as a result of the growth of Internet shopping. Compared with the main forecast, which is based on the latest Experian projections, in the higher option we have adopted the recommendations of the Regional Centres Study of an increase to 20% in 2021. In the lower option, a growth to 12% in 2021 is assumed based on earlier Experian projections quoted in the Regional Centres Study.

	2006	**2011**	**2016**	**2021**	**2026**
Main forecast	8.3%	13.4%	13.9%	13.9%	13.9%
Lower option	8.3%	10%	11%	12%	12%
Higher option	8.3%	13.4%	18%	20%	20%

Range of Sensitivity

5.38 In the case of convenience goods the range of sensitivity is represented by 3 scenarios – the main scenario and 2 alternatives based on higher retention levels and lower expenditure growth. The alternatives of a higher retention level result in a greater capacity for convenience goods retail development. The alternatives of lower expenditure growth result in a lower capacity.

5.39 In the case of comparison goods there is a total of 6 scenarios – the main scenario and 5 alternatives based on higher expenditure growth, higher retention levels, increased sales productivity, a lower growth in Internet shopping and a higher growth in Internet shopping. The alternatives of increased sales productivity and a higher growth in Internet shopping result in a smaller capacity for comparison goods retail development. The other alternatives all result in a larger capacity for comparison goods retail development.

5.40 We have produced a range of scenarios of future capacity by testing the sensitivity of the forecasts individually. A total of 9 scenarios for both Lichfield and Burntwood should be sufficient to show the extent of sensitivity of the capacity forecasts. We have not looked at the various permutations that would be possible by combining say higher population growth and higher expenditure growth. A total of 80 different permutations is possible. However we comment on the likelihood of any combination of scenarios creating a level of capacity that would be significantly in excess of the upper end of the range of the individual scenarios. Sensitivity is not assessed for bulky goods because it would make the range of data in the assessment excessively complex.

5.41 The inputs to the sensitivity analysis figures are shown in detail in Appendix 6. They comprise:
Appendix 6A – Convenience Goods Expenditure assuming Lower Expenditure Growth
Appendix 6B – Comparison Goods Expenditure assuming Higher Expenditure Growth
Appendix 6C – Comparison Goods Expenditure assuming Lower Growth in Internet Shopping
Appendix 6D – Comparison Goods Expenditure assuming Higher Growth in Internet Shopping.

5.42 The results of the capacity analysis based on various assumptions about sensitivity are shown in detail in Appendix 7 for convenience goods and Appendix 8 for comparison goods. The assumptions tested in the sensitivity analysis are listed below:
<u>Convenience Goods</u>
Appendix 7A – Higher Retention Level, Lichfield catchment area
Appendix 7B – Lower Expenditure Growth, Lichfield catchment area
Appendix 7C – Higher Retention Level, Burntwood catchment area
Appendix 7D – Lower Expenditure Growth, Burntwood catchment area
<u>Comparison Goods</u>
Appendix 8A – Higher Expenditure Growth, Lichfield catchment area
Appendix 8B – Higher Retention Level, Lichfield catchment area
Appendix 8C – Higher Growth in Sales Productivity, Lichfield catchment area
Appendix 8D – Lower Growth in Internet Shopping, Lichfield catchment area
Appendix 8E – Higher Growth in Internet Shopping, Lichfield catchment area
Appendix 8F – Higher Expenditure Growth, Burntwood catchment area
Appendix 8G – Higher Retention Level, Burntwood catchment area
Appendix 8H – Higher Growth in Sales Productivity, Burntwood catchment area
Appendix 8J – Lower Growth in Internet Shopping, Burntwood catchment area
Appendix 8K – Higher Growth in Internet Shopping, Burntwood catchment area

5.43 Appendix 9 brings together the sensitivity of the capacity analysis for convenience and comparison goods in Lichfield and Burntwood. The sensitivity of the convenience goods capacity is shown in Appendix 9A and the sensitivity of the comparison goods capacity is shown in Appendix 9B. In each case we have stated the relevant Appendix number for the detailed capacity analysis for ease of reference.

5.44 The range of sensitivity is summarised in the table below.

Capacity (£ million)	**2011**	**2016**	**2021**	**2026**
Convenience Goods				
Lichfield	-0.3 to 0.9	-3.5 to 1.9	2.3 - 10.8	8.0 - 17.2
Burntwood	1.3 - 1.9	2.4 - 12.7	3.6 - 15.7	5.8 - 20.0
Comparison Goods				
Lichfield	-13.6 to -6.3	-47.8 to -15.9	-25.9 to 13.2	-0.9 to 51.7
Burntwood	-0.2 to 5.0	0.4 - 10.0	5.8 - 17.3	5.8 - 22.0

5.45 In convenience goods the alternative scenarios reflect a range from the main capacity forecast up to a lower capacity. In Lichfield the highest figure in 2026 reflects the higher retention level but it is only slightly higher than in the main forecast. In Burntwood the highest figure in 2026 also reflects the higher retention level and represents a moderate additional capacity over and above the main forecast. A higher retention in Burntwood is possible if there was to be demand for a new foodstore development.

5.46 In comparison goods the range of assumptions is wider. The main scenario represents a more central forecast than for convenience goods. In Lichfield there is a negative capacity in all the scenarios up to 2016. Even the most optimistic scenario based on higher expenditure growth only provides an additional £13m potential for new comparison goods shopping in 2021 over and above the main scenario which takes account of the committed Friarsgate scheme. Higher expenditure growth and a higher retention level both result in additional capacity in Lichfield in 2026.

5.47 In Burntwood there is a narrower range in variation in assumptions around the main capacity forecast for comparison goods. The highest levels of capacity occur with the higher retention level, followed by higher expenditure growth. A retention level as high as 35% is possible but is not likely. It would imply an unduly optimistic view of the ability of Burntwood to compete with Lichfield and other larger town centres for market share in comparison goods shopping. A capacity above the main forecast is most likely if there is higher expenditure growth up to 2026. In our view a capacity much below the main forecast is unlikely to occur because the assumptions of higher increases in sales productivity and Internet shopping are extreme alternatives. Therefore the main forecast for Burntwood is a robust one.

Sensitivity of the Floorspace Capacity

5.48 The final element of the need assessment is the sensitivity of the floorspace capacity for convenience and comparison goods. In Appendix 10 we have taken the capacity figures in the main scenario which have been used above in calculating floorspace and as an upper scenario we have used the highest of the alternative assumptions in terms of capacity to calculate the maximum floorspace capacity that should be allowed for the LDF Core Strategy up to 2026. The basis for the calculations is set out in Appendix 10A for convenience goods and Appendix 10B for comparison goods.

Sensitivity of Floorspace Capacity (sq. metres gross)	2011	2016	2021	2026
Convenience Goods				
Lichfield				
main	nil	30 - 90	1,100 - 3,000	1,800 – 4,900
max	100 - 300	200 - 600	1,300 - 3,500	2,000 - 5,500
Burntwood				
main	200 - 600	500 - 1,300	700 - 2,000	1,100 - 3,000
max	200 - 600	1,500 - 4,300	1,900 - 5,100	2,300 - 6,300
Comparison Goods				
Lichfield				
main	nil	nil	nil	3,800 - 5,400
max	nil	nil	2,400 - 3,400	8,400 - 12,000
Burntwood				
main	nil	800 - 1,100	1,800 - 2,500	2,100 - 3,000
max	1,100 - 1,600	2,000 - 2,900	3,100 - 4,500	3,600 - 5,100

5.49 In convenience goods the maximum figures for Lichfield represent only a slightly higher floorspace capacity than in the main forecast. In Burntwood (after allowing for the Morrisons extension) the higher floorspace capacity reflects a higher retention level and confirms that there may be potential for further foodstore development in the longer term.

5.50 In comparison goods the maximum floorspace capacity in Lichfield is substantially higher than in the main forecast, reflecting higher expenditure growth and/or a higher retention level. This additional potential could only be supported in Lichfield after 2016 following completion of the Friarsgate redevelopment scheme. Some of the longer term potential in Lichfield in comparison goods could be accommodated in the form of retail warehouse development, perhaps in the Eastern Avenue area. There is a more limited additional capacity for comparison goods development in Burntwood from 2016 onwards in the higher forecast but it is dependent on a higher retention level which we believe is unlikely to be achieved. Nevertheless, there is more than sufficient capacity in the main forecast for a moderate expansion of Burntwood town centre (as discussed in Section 7).

6. RETAILING IN LICHFIELD CITY CENTRE

6.1 Although the Friarsgate redevelopment scheme approved at Birmingham Road will meet most of the future shopping needs of Lichfield in the LDF period, the following section examines the appropriate scale of retail development in Lichfield city centre, and provides an overview and sequential assessment of potential opportunities for further retail development in Lichfield city centre.

6.2 The references to further potential for retail development in Lichfield city centre are made on the basis that there is a major committed city centre redevelopment scheme at Birmingham Road (Friarsgate) which will be developed over a period extending beyond 2011. This scheme was approved by the Council's Planning Committee in December 2006. It is a mixed use redevelopment scheme comprising retail (Class A1), restaurant and bars (Class A3/A4), a hotel (Class C1), cinema and other leisure space (Class D2), office (Class A2/B1, 56 residential units (Class C3), a police facility, public squares, a replacement public transport interchange, car parking and associated landscaping, servicing and access.

6.3 The Class A1 retail element of the scheme measures 22,000 square metres in total (controlled by planning condition), and comprises a large format department store (Debenhams) providing 6,054 sq.m. of floorspace and 35 smaller retails units of varying sizes provided on the upper floors of the proposed development. This retail format is consistent with the Urban Design Framework prepared for the site which recommended its suitability for small size retail units, as opposed to larger retail/ warehouse operators, which would be constrained by their design, layout and parking requirements.

Vitality and Viability of Lichfield city centre

6.4 England & Lyle carried out a health check appraisal of Lichfield city centre in March 2007 to assess its vitality and viability using a range of indicators and factors. The appraisal was updated in February 2009. The Health Check Appraisal Sheet is included in Appendix 12 of this Update report.

6.5 The overall vitality and viability index obtained on the health check appraisal for Lichfield is 3.7 which is a relatively high level of vitality and viability. Lichfield's main strengths are the small amount of floorspace outside the centre; the capacity for growth and change in the centre; a good diversity of main town centre uses; generally good retailer representation; low vacancies; improving commercial performance; high volume of pedestrian flow; high level of accessibility; safety and security; and high environmental quality including a very good pedestrian environment and quality of open spaces and landscaping. Lichfield has no identified weaknesses. Unusually for this type of appraisal, no single factor has been rated as poor. The overall vitality and viability index has increased from 3.6 in March 2007 to 3.7 in February 2009. The vitality and viability of the centre is strong and it will improve even further when the Friarsgate redevelopment scheme takes place.

Appropriate scale of retail development in Lichfield city centre

6.6 Section 5 of this report sets out the basis for the assessment of floorspace capacity in Lichfield through the LDF period. Although there is some capacity for additional convenience goods shopping in Lichfield, we do not think it is appropriate to try to accommodate further large-scale foodstore development in the city centre. The historic fabric of the city centre is a constraint on any large-scale retail development. Other than the Friarsgate redevelopment scheme, Lichfield is one of the centres in the West Midlands considered to the most constrained in terms of physical capacity for retail development. We have taken account of the proposals for some of the Friarsgate floorspace to be used for convenience goods shopping but the vast majority will be used for comparison goods.

6.7 Therefore we limit our comments on opportunities for further retail development to comparison goods. The floorspace capacity is up to 5,400 sq.m. gross in the main forecast, rising to between 8,400 and 12,000 sq.m. gross in the upper scenario. In our view the upper scenario is optimistic but it could be achieved if there was to be higher expenditure growth or a higher retention level in the long term. For robustness the Core Strategy should take some account of the longer term requirements for shopping floorspace in Lichfield taking a relatively optimistic view. However, the figure of 8,400 sq.m. gross is the more realistic of the upper figures because it is based on a sales density for comparison goods that is typical of town centre comparison retailing rather than retail warehouses.

6.8 Allowing for some land to be used for access, servicing and car parking, it would be appropriate to assume that a ratio of 50% of gross floorspace to site area in the city centre. The floorspace capacity of 5,400 to 8,400 sq.m. in comparison goods translates to a site area requirement of between 1.1 and 1.7 hectares. Some of this capacity will be in bulky goods outside the city centre and we have identified a floorspace capacity of up to 3,500 sq.m. gross in bulky goods in Lichfield in 2026. Therefore the likely need for sites in the city centre for comparison goods development in the longer term is in the order of 1.0 hectares.

Opportunities for further retail development in the city centre

6.9 In accordance with PPS6: Planning for Town Centres, a number of selected sites have been identified within and on the edge of Lichfield City Centre. These sites are assessed in the following section in terms of their appropriateness for accommodating the scale of retail development envisaged. The following assessment aim to demonstrate the practicability of these alternatives in terms of the factors referred to in PPS6 – availability, suitability and viability.

- *Availability:* are sites available now or likely to become available for development within a reasonable period of time?
- *Suitability:* having due regard to the requirements to demonstrate flexibility, are sites suitable for the type of development proposed?
- *Viability:* would development be viable on these sites?

6.10 The map in Appendix 13 relates to the numbering of the sites assessed below:

Site 1 - Bird Street Car Park

6.11 Measuring approximately 0.9 hectares in area, and situated on the northern edge of the primary retail area. The site is currently utilised as a surface car park, with pedestrian links onto Bird Street, Market Street and Dam Street, via the adjacent Minster Pool park and walkway.

6.12 The site is well related to the existing primary retail frontage along Bird Street and Market Street. The Council has acquired the Woolworths and New Look premises to create a frontage to the site. A draft development brief has been prepared which identifies the possibility of developing a mixed use scheme on this site, including the Woolworths/New Look premises, and is currently subject to consultation.

6.13 Vehicular access to the site would be taken from Bird Street, via Swan Road, with the potential to provide adequate parking if floorspace at 25-27 Bird Street is integral to any future retail scheme. Local Plan Policy L23 proposes improvement to the Swan Road/ Bird Street junction.

6.14 The site is situated adjacent to an area in which conservation policies relating to protected views of the Cathedral (Local Plan policy 48) and open space/ parkland (Policies L37, L49 and L50) apply. The site is therefore constrained in term of providing retail warehouse development which is likely to be out of scale and character with this surrounding area and disrupt views of the Cathedral. The Woolworths/New Look premises are identified in the Local Plan (Policy C7) as being out of character with the surrounding areas. A mixed use development, incorporating a significant proportion of retail is (perhaps) more suitable on the site.

6.15 The site is flat, undeveloped and (likely to be) in predominantly single, Council ownership. It is therefore a viable option to accommodate a comprehensive retail and mixed use development

Site 2 - Redcourt House/ Backcester Lane

6.16 This site is located within an area allocated as a City Centre Redevelopment site (Local Plan Policy L15) on the eastern edge of the centre within the city centre boundary. It currently provides car parking, adjacent to the Three Spires Centre.

6.17 The site is segmented into three parts by Gresley Row and Backcester Lane and car parking is provided on different levels. Therefore it is envisaged that significant engineering works would be required to assemble the site into one comprehensive development site measuring 1.0 hectares. The viability and suitability of the scheme is not certain at the present time. It seems likely that it would have to be developed in a number of parts and not necessarily all for retailing. The site is only likely to become available in the longer term.

Site 3 – Tesco redevelopment site, Church Street

6.18 The site is located in an edge-of-centre location bounded by Church Street and St. Michael Road. Planning consent has been granted for redevelopment of the site for a new larger Tesco superstore. Demolition of the former Focus DIY and Tesco stores has taken place and the new store is under construction.

6.19 A review of retail implications of the Tesco proposal was carried out by England & Lyle in May 2007. The proposal is in a reasonably accessible location but the pedestrian linkages could be improved. The site is conveniently located close to the centre, which is constrained in terms of accommodating large modern foodstores. It offers the opportunity for linked trips to the city centre.

Site 4 - Sandford Street Car Park

6.20 The site is located outside the western limits of the primary retail area but is just a short distance from Market Street and is easily accessible via Bird Street, which is pedestrianised. It is currently in use as a car park serving a recent development containing both offices and residential development. This car parking would need to be replaced nearby if it was developed on.

6.21 On inspection, a number of vacant commercial (non-retail) frontage units along Sandford Street are being advertised as vacant. The office building on the corner of Sandford Street is classified as a building out of scale or character with the surrounding area in the Local Plan (policy C7). Although accessible, the site does not currently benefit from road frontage that would be attractive to retailers.

6.22 The site is considered to be only partly available, unsuitable given its constraints and unviable given that acquisition from multiple ownership and potential demolition would have to occur to make the site attractive.

Site 5 - Fire and Ambulance Station

6.23 The site is approximately 0.5 hectares in size, with frontage facing onto Birmingham Road. It is situated within the broader Station Road Business Area (Local Plan policy L19), directly opposite to the south of the Three Spires Primary Retail Area, close to the approved Friarsgate development.

6.24 Any retail development on this site would firstly require the relocation of the Fire and Ambulance stations and no alternative location has yet been identified. The site is therefore not immediately available. Given that it is outside the existing primary retail area, it is also considered to be unsuitable and unviable.

Site 6 – Former Kwik Save and Car Park, Tamworth Street

6.25 The site is situated on the northern edge of the city centre. The site comprises a vacant building formerly used as a Kwik Save supermarket (and originally a cinema), retail store and surface level and multi-storey car parks. The property is currently being marketed.

6.26 Although the site is limited in scale, it presents a suitable opportunity, as with the Bird Street site, to open up new retail frontage onto the secondary retail area (Tamworth Street). This would however involve the acquisition and relocation of existing business properties, which are both let and therefore the site is not available or viable. The existing car parking area could be used to serve any new retail development.

Site 7 – Land adjacent to the Friary Ancient Monument (Friary Inner site)

6.27 The site currently forms a parking area which serves the adjacent business area, bounded by an area acquired for future commercial development. The car park is currently not available and would need to be replaced in an alternative location. The site is therefore also considered to be unviable.

6.28 The site is considered to be too constrained in size and as result it is unsuitable for any future significant retail development, particularly given its sensitive location next to the remains of the ancient Friary (Local Plan policy E7 – Ancient Monument).

Site 8 - Station Road Area

6.29 This site forms the wider area to the south of the Fire and Ambulance station and adjacent to the railway station and Birmingham Road scheme. The land is identified in the Local Plan as an Allocation for Business Uses (Policy L9)

6.30 A significant proportion of the land is used for occupied residential properties and businesses. The site is irregular in shape and situated on an upward incline, sandwiched between Birmingham Road and the railway line.

Site 9 - Wade Street/ Bore Street

6.31 Located within the secondary retail area between Bore Street and Wade Street, this site is severely constrained in size and includes parking and loading/servicing for a variety of nearby housing and retail users. It is unsuitable as it does not currently benefit from any potential to create a retail frontage and would be unattractive to developers without acquisition and redevelopment of the existing large retail unit facing onto Bore Street, which is currently occupied. The site is also not available or viable.

Site 10 - Quonians Lane Works

6.32 The site is situated within the northern section of the secondary retail area. 0.45 hectares in area, the works site is currently occupied by an industrial training company. It is therefore unavailable at present.

6.33 The existing parking area to the rear of the site could be utilised to serve any future retail development. Access is limited to the southern entrance to the site as the northern section leads to protected open space and the Cathedral area.

6.34 Although potentially suitable for a form of retail development in the longer term, the site is not considered to be available or viable in its existing context.

Site 11 – St. John the Baptist Hospital

6.35 Situated along Birmingham Road, on the opposite corner of St. John Street, the site mainly comprises the gardens and small scale historical buildings accommodating the hospital. The site is therefore currently unavailable and the site's historical setting outside the existing retail centre renders it unsuitable and unviable at present.

Site 12 – Car and Lorry Park around Telephone Exchange building (Friary Outer site)

6.36 On the edge of the centre, the site is of a suitable size to accommodate retail development. However, any future development would be reliant on the acquisition of the existing occupiers who would have to be relocated. The site is not currently available and the existing car parking areas form an irregularly shaped site, which is considered unviable at present.

6.37 Planning permission has been granted for a mixed use scheme including residential and commercial uses and car parking. The site forms part of the Council's strategy to increase parking provision for the city centre. The application is enabling development for this and the site is unavailable for this reason.

Summary of PPS6 tests for each site

6.38 The following table is a summary of the above assessment in terms of the availability, suitability and viability factors in PPS6 relating to the sequential preferability of the alternative sites discussed above.

Map Ref.	Site	Location	Site Area (hectares)	Available	Suitable	Viable
1.	Bird Street Car Park	Edge of Centre	0.9	Yes	Yes	Yes
2.	Backcester Lane/ Redcourt House Area	Within Centre	1.0	No	Yes	Yes
3.	Tesco redevelopment site	Edge of Centre	3.0	Yes	Yes	Yes
4.	Sandford Street Car Park	Edge of Centre	0.2	No	No	No
5.	Ambulance & Fire Station, Birmingham Road	Edge of Centre	0.5	No	No	No
6.	Former Kwik Save & Car Park Area	Within Centre	0.4	Yes	Yes	No
7.	The Friary Car Park (Friary Inner site)	Edge of Centre	0.2	No	No	No
8.	Station Road Area	Edge of Centre	0.9	No	No	No
9.	Bore Street/ Wade Street	Within Centre	0.1	No	No	No
10.	Quonians Lane Works	Within Centre	0.5	No	Yes	No
11.	St. John The Baptist Hospital	Edge of Centre	0.4	No	No	No
12.	Car & Lorry Park, off The Friary (Friary Outer site)	Edge of Centre	0.5	No	Yes	No

6.39 The site area requirement to meet the identified floorspace capacity in Lichfield city centre is in the order of 1.0 hectares. The sites we have assessed that are most appropriate in terms of being available, suitable and viable are Site 1, the Bird Street car park, and Site 2, the Backcester Lane area. The Bird Street car park has a site area of 0.9 hectares and would provide the vast majority of the land required to meet the additional capacity. Part of the Backcester Lane area has potential for retail development and it would take up the remainder of the overall land requirement.

6.40 PPS6 paragraph states that in planning for growth in town centres, local planning authorities should allocate sufficient sites to meet the identified need for at least the first 5 years from the adoption of their development plan documents, although for large town centre schemes a longer period may be appropriate for land assembly. We would advise the Council that the Bird Street and Backcester Lane areas offer the best potential in Lichfield city centre for further retail development in the long term, in addition to the Friarsgate scheme, and they should be allocated accordingly.

7. RETAILING IN BURNTWOOD

Shopping Patterns

7.1 The household survey carried out for the 2004 Retail Study shows where shoppers in Burntwood live. The survey area includes the Burntwood wards and wards in the neighbouring districts of Walsall and Cannock Chase. The survey tabulations have been analysed for food and non-food shopping. Shopping patterns are summarised below.

Place of residence of shoppers in Burntwood (%)	Burntwood wards	Walsall wards	Cannock Chase wards	Total
Main food shopping	83	2	15	100
Top-up food shopping	89	3	8	100
Furniture, carpets and household textiles	80	3	17	100
Electrical goods	77	10	13	100
Other non-food goods	76	6	18	100

7.2 For food shopping the responses are for shoppers using Safeway (Morrisons) and smaller supermarkets in Burntwood. They show that the vast majority of people doing both main food shopping and top-up food shopping in Burntwood town centre live in the Burntwood urban area. Relatively few live in Walsall District (Brownhills) and slightly more in Cannock Chase District (primarily Norton Canes and Rawnsley). For non-food shopping a higher proportion of shoppers in Burntwood live in the Cannock Chase wards and there is again a low proportion from the Walsall wards (Brownhills and Aldridge North/Walsall Wood).

7.3 The results confirm that the primary catchment area of Burntwood is the Burntwood urban area and that the Walsall and Cannock Chase wards form a more secondary catchment area. The expenditure flow analysis based on the household survey shows that:

- In convenience goods Burntwood town centre has a market share of 50% of spending from the primary catchment area (Burntwood) and 4% from the secondary catchment area.
- In comparison goods Burntwood town centre has a market share of 5% of spending from the primary catchment area (Burntwood) and 2% from the secondary catchment area.

7.4 In the main forecast it is assumed that Burntwood’s market share of convenience goods spending from the primary catchment area will increase to 55% based on the approved extension of the Morrisons store but it could increase to 70% if there is further foodstore development in Burntwood. In comparison goods Burntwood’s market share of spending from the primary catchment area is forecast to increase to 30% if new retail development takes place.

7.5 A cautious approach has been adopted to assessing future changes in market shares from the secondary catchment area. An extended Morrisons store could attract a small amount of further trade from the secondary catchment area, notably from the

Norton Canes and Rawnsley areas of Cannock Chase District. A small increase in market share is assumed in convenience goods from 4% to 5%. In comparison goods Burntwood's market share of spending from the secondary catchment area is forecast to increase from 2% to 4% if new retail development takes place. These forecasts acknowledge that residents in the Walsall and Cannock Chase wards will still find it more convenient to shop in Walsall, Brownhills and Cannock for most of their food and non-food shopping requirements.

Longer Term Needs in Burntwood

7.6 In this report we have carried out an assessment of future needs in Burntwood in the LDF period to 2026. In convenience goods the assessment indicates a floorspace capacity of between 770 and 2,120 sq.m. net in 2026 in addition to the Morrisons extension. This represents between 1,100 and 3,000 sq.m. gross in convenience goods.

7.7 In comparison goods the assessment indicates a floorspace capacity of between 1,440 and 2,060 sq.m. net in 2026 in addition to the comparison element of the Morrisons extension and the committed London & Cambridge Properties (LCP) scheme. This represents between 2,100 and 2,900 sq.m. gross. The total floorspace capacity is between 3,200 and 5,900 sq.m. gross.

7.8 These are the forecasts considered most likely in the 'main' scenario and it should be emphasised that they represent additional floorspace over and above the existing commitments for Morrisons and the LCP scheme. The commitments do not include any development on the Olaf Johnson site. Including the Morrisons and LCP commitments the total capacity for additional floorspace is as follows.

Floorspace Capacity, Burntwood (sq. metres)

	2016	2021	2026
NET FLOORSPACE			
Convenience Goods			
Morrisons extension	270	270	270
additional capacity	330-900	510-1,400	770-2,120
Total Convenience (net)	600-1,170	780-1,670	1,040-2,390
Comparison Goods			
Morrisons extension	530	530	530
LCP scheme	6,580	6,580	6,580
additional capacity	540-770	1,230-1,750	1,440-2,060
Total Comparison (net)	7,650-7,880	8,340-8,860	8,550-9,170
GROSS FLOORSPACE			
Total Convenience	860-1,670	1,110-2,390	1,490-3,410
Total Comparison	10,930-11,260	13,340-12,660	12,210-13,100
All Retail	11,790-12,930	14,450-15,050	13,700-16,510

7.9 Our advice to the Council is that this is the appropriate scale of retail development in an enlarged town centre in Burntwood in the context of local needs in the Burntwood catchment area, and in the context of the potential for additional convenience and comparison goods shopping in Lichfield District overall. The forecast is based on a modest increase in the retention level for convenience goods in the Burntwood primary catchment area from 50% at present to 55% in the future. In comparison goods the forecast is based on a greater potential to increase the retention level in the Burntwood primary catchment area from only 5% at present to 30% in the future. As noted above, these forecasts assume only a slight increase in Burnwood's market share of spending from the secondary catchment area – in convenience goods from 4% to 5% and in comparison goods from 2% to 4%.

7.10 The additional floorspace capacity we have identified in Burntwood would have to be accommodated on the Olaf Johnson site. There are no other options for new retail development in Burntwood. The site is large enough to accommodate the total additional floorspace potential of up to 5,900 sq.m. gross. The site has an extant consent for about 6,000 sq.m. gross floorspace. It is well located in relation to existing shopping at Sankey's Corner, the Morrisons store and the committed LCP scheme on the Hoardings site. We would emphasise, however, that no further retail development in Burntwood should take place until after the LCP scheme has been completed and fully trading. There is no capacity for additional floorspace in convenience or comparison goods until after 2011.

7.11 Having tested the sensitivity of the need assessment, our view is that in convenience goods a higher retention level of 70% in the primary catchment area could be achieved. The Morrrisons extension will make that store more attractive and reduce leakage to other foodstores outside Burntwood. A further small increase in the retention level for convenience goods could provide the potential for another foodstore. In comparison goods the sensitivity analysis shows that there would be a higher floorspace capacity if there is higher expenditure growth but it would be unsound to base any floorspace requirement in Burntwood town centre on such assumptions. We have also considered the possibility of a greater increase in the retention level for comparison goods in the primary catchment area to 35%. We believe that an increase to more 30% is unlikely in view of the proximity of larger town centres which are attractive for comparison goods shopping (Lichfield, Walsall and Cannock) and will become more attractive with new developments, notably the Friarsgate redevelopment scheme in Lichfield. Also, there is leakage of bulky goods expenditure to retail parks in Cannock and Walsall and that will not be reduced significantly by new town centre shopping in Burntwood.

7.12 The availability of the Olaf Johnson site offers the possibility that the Burntwood primary catchment area could support further convenience goods floorspace. There is an identified capacity for up to 3,000 sq.m. of new convenience goods floorspace in Burntwood on the Olaf Johnson site. The comparison goods capacity of up to 2,900 sq.m. gross could also be accommodated on that site. The total floorspace potential in comparison goods in Burntwood would then be 13,000 sq.m. gross, including the committed LCP scheme and the comparison goods element of Morrisons. The development of part of the Olaf Johnson site partially for convenience goods would reduce the scale of additional comparison goods floorspace in Burntwood in the plan period to a level that is consistent with the RSS guidelines.

Vitality and Viability of Burntwood town centre

7.13 England & Lyle carried out a health check appraisal of Burntwood town centre in March 2007 to assess its vitality and viability using a range of indicators and factors. The appraisal was updated in February 2009. The Health Check Appraisal Sheet is included in Appendix 12 of this Update report.

7.14 The overall vitality and viability index obtained on the health check appraisal for Burntwood is 3.3 which is above average. Burntwood's main strengths are the lack of floorspace outside the centre; the capacity for growth and change in the centre; sports and leisure facilities; the availability of food shopping; lack of charity shops; lack of vacancies; availability of car parking; good public transport. Its main weaknesses are in terms of the limited range of shops; low retailer demand; high leakage of trade and a generally poor shopping environment. The overall vitality and viability index has increased from 3.2 in March 2007 to 3.3 in February 2009. However, Burntwood is a centre in need of improvement. It needs to have an improved retail offer and a consolidation of its retail provision to increase the critical mass of shopping in the centre.

Commercial Viability

7.15 One of the key issues concerning Burntwood is the scale of development that would be commercially viable. In March 2006 Drivers Jonas prepared a report for Lichfield District Council on retailer demand in Burntwood, following recommendations in the GL Hearn retail study in 2005 that an assessment of market demand should be prepared for Burntwood. The report looked at the scale of development that would be appropriate to ensure that a town centre proposal for Burntwood is viable.

7.16 Drivers Jonas found that potential demand from A1 non-food national multiple retailers at that time was approximately 16,443 sq. m (177,000 sq ft). They concluded that, for Burntwood to achieve sufficient critical mass and truly serve local needs, there should be not less than 16,000 sq.m. gross floorspace during the plan period. This assessment was based primarily on expressions of interest from specific retailers for a site in Burntwood, provided that there was a step change in the scale and quality of the centre.

7.17 Reporting on the Examination of the LDF Core Strategy the Inspector thought the commercial viability of any proposal for Burntwood was an important consideration. Viability relates both to the ability of the new centre to attract a good number and variety of retailers and to create sufficient investment confidence for the landowner/developer to proceed with a scheme. In the Inspector's view, the Drivers Jonas study was a useful snapshot of market interest, but can only be illustrative of the scale of the centre at the present time because retailer interest in a particular location can come and go relatively quickly.

7.18 We have not been asked by the Council to assess market demand as part of our consultancy advice and we have not looked at the current state of market demand in Burntwood. Commercial viability is important but in planning terms it is more important to have a robust basis for identifying the need for additional retail floorspace. The level of need we have identified is also about 16,000 sq.m. gross, of which about 13,000 sq.m. gross is in comparison goods.

7.19 The Retail Assessment by GVA Grimley (March 2007) in support of the planning application by LCP states that it is imperative that the development contains sufficient critical mass of units and floorspace to attract retail investment. GVA Grimley consider that the planning consent on the Olaf Johnson site (now owned by LCP) is not of sufficient interest to retailers to produce a viable development. However, the report indicates that LCP are committed to a "phased approach to town centre development through collaboration on the preparation of a development brief for the Olaf Johnson site and continued marketing of the site".

7.20 The LCP scheme should satisfy market demand during the period to 2011. LCP have identified that the scheme should be tailored to meet demand for units of between 289 and 1,858 sq.m. gross floorspace. If the LCP development is commercially successful it will create the critical mass that is sought for Burntwood. This in turn should help to stimulate further market demand in the longer term. The level of additional need we have identified in the period 2011 to 2026 should be capable of being sustained in terms of future market demand and it is a scale of development that should be commercially viable.

Retail Impact of an Enlarged Town Centre at Burntwood

7.21 The Inspector at the Examination of the Core Strategy said that the size and potential effects of a new major retail development in Burntwood need to be scrutinised carefully and fully justified by local circumstances. As part of this evidence base we have assessed the impact of an enlarged town centre at Burntwood and its implications for the vitality and viability of other centres in the Burntwood catchment area and in neighbouring Districts (Walsall and Cannock Chase). The impact assessment takes account of the approved LCP scheme, the potential for additional floorspace at Burntwood and the mix of retail format (High Street and bulky goods).

7.22 The retail impact tables are included in Appendix 14 of this report. A retail impact assessment was carried out by England & Lyle in reviewing the proposal by LCP for a non-food retail development on the Hoardings site. The assessment is for comparison goods only. This assessment is shown in Appendix 14A. It takes account of turnover in the Morrisons extension as well as in the LCP scheme. The design year for the impact assessment has been extended to 2016 to allow sufficient time for these new schemes to be developed and operational. We predicted that 20% of the trade draw to the LCP scheme would be from Lichfield city centre, 2% from Brownhills, 3% from other centres and stores in the study area, 70% from clawback of leakage and 5% from inflow of trade from outside the study area. The predicted trade diversions in comparison goods are 4.1% from Lichfield city centre, 3.2% from Burntwood (Sankey's Corner), 3.1% from Brownhills and 4.3% from other centres and stores in the study area. These are not significant levels of impact in comparison goods. The predicted impacts arising from clawback from outside the study area are 1.7% in Walsall town centre and 2.9% in Cannock town centre.

7.23 Impact has to be interpreted in the context of the vitality and viability of town centres. Appendix 11 of this report contains our updated health check of Burntwood town centre. The overall vitality and viability index obtained on the health check appraisal for Burntwood is 3.3 which is above average. Burntwood is a centre in need of improvement. It needs an improved retail offer and a consolidation of its retail provision to increase the critical mass of shopping in the centre. We believe that, despite some competition from new retail development on the Hoardings site, any initial trade losses will not be significant and there will be spin-off benefits for existing traders at Sankey's Corner. In any event the strength of Burntwood at present is in its convenience goods shopping and that role will continue.

7.24 We have also carried out a health check of Lichfield city centre which is included in Appendix 11. The overall vitality and viability index obtained on the health check appraisal for Lichfield is 3.7 which is well above average. The vitality and viability of the centre is relatively strong and it will improve even further when the Friarsgate scheme takes place. In the context of the health of the city centre, the level of impact on comparison goods trade is not significant. It represents just one year's growth of comparison goods expenditure.

7.25 In Appendix 14B we show the trading impact of the LCP scheme together with the longer term option of further retail development on the Olaf Johnson site. It is a cumulative impact assessment. The assessment is for comparison goods only. We take the view that that the floorspace capacity for additional convenience goods shopping in Burntwood could also be accommodated at Burntwood on the Olaf Johnson site, without any negative trading impact other than in the form of competition with Morrisons and Tesco. The assessment takes a long term view across the plan period to 2026. We have increased the turnovers of centres and the LCP scheme accordingly to reflect continued growth in sales productivity between 2011 and 2026.

7.26 In comparison goods we have identified a capacity for £12.7m of additional development in 2026. For the purposes of this assessment we have used the same trade draw percentages for the additional trade as for the LCP scheme on the basis that it will also be for general comparison goods. On its own the additional development will have a minimal impact on any centres. The cumulative impacts in comparison goods are 5.3% from Lichfield city centre, 4.2% from Burntwood (Sankey's Corner), 4.0% from Brownhills and 5.5% from other centres and stores in the study area. The predicted impacts arising from clawback from outside the study area are 2.2% in Walsall town centre and 3.7% in Cannock town centre. Although the predicted levels of impact are slightly higher than for the LCP scheme on its own, they are still not significant and in PPS6 terms there would not be any unacceptable impacts on any centres.

7.27 In the LDF Core Strategy Examination the Inspector commented on the need to consider the implications of the mix of retail format (High Street and bulky goods) in any future retail development in Burntwood. In Appendix 14B we have examined the implications of a further retail development based on general comparison goods shopping and based on a turnover level that is consistent with general (High Street) comparison goods. To test the option of a different form of development, in Appendix 14C we assume that the LCP Hoardings site is developed for bulky goods with a lower turnover of £29.0m and that the Olaf Johnson site accommodates general comparison goods development (the same as in Appendix 14B). Therefore we have examined the full range of possible retail formats in comparison goods.

7.28 In Appendix 12C for bulky goods we have modified the trade draws slightly to reflect the fact that there will be greater competition with out-of-centre retail warehouses and less competition with town centres. For the bulky goods element of new floorspace we assume a 12% trade draw from Lichfield city centre and 10% from other stores and centres in the study area which include retail warehouses in Lichfield. Outside the study area we assume a 45% trade draw from out-of-centre retail parks and lower trade draw from Walsall and Cannock town centres. The cumulative impacts in this option are 2.9% from Lichfield city centre, 3.1% from Burntwood (Sankey's Corner), 3.0% from Brownhills and 15.6% from retail warehouses and other stores in the study area. The predicted impacts arising from clawback from outside the study area are 1.4% in Walsall town centre and 2.1% in Cannock town centre. Again these are not significant levels of impact in PPS6 terms.

7.29 It should be noted that PPS6 paragraph 3.21 requires an assessment of the impact of a proposal on the vitality and viability of existing "within the catchment area of the proposed development", including cumulative impacts. There is no requirement to assess the impact on centres outside the catchment area. In the case of Burntwood it is not strictly necessary to consider the likely impacts on Cannock and Walsall although we have done so for robustness. It is clear from our assessments that there will be no significant impacts on comparison goods trade in Cannock and Walsall town centres. For both the LCP scheme and any further development in the Burntwood town centre area, the largest trade diversions arising outside the study area are likely to be on the out-of-centre retail parks in Cannock, Walsall, Tamworth and Burton which are the destination for much of the leakage of trade from Lichfield District in comparison goods. Impacts on these out-of-centre retail parks are a matter of competition, not a material planning consideration.

7.30 In assessing impact we have not taken account of the implications of any future retail developments that may have a bearing on shopping patterns in the Burntwood area, other than the Friarsgate scheme in Lichfield which is included in the future turnover for Lichfield city centre. We have not examined the implications of any future retail development proposals in Cannock and Walsall. From discussions with officers of Walsall and Cannock Chase Councils we are aware that there are proposals for new retail development in Walsall and Cannock town centres which would have implications for shopping patterns in Lichfield District but these implications cannot readily be assessed at present.

Sustainability of a New Centre at Burntwood

Accessibility and Sustainability

7.31 The Inspector also raised the issue of the sustainability of a new centre at Burntwood. He said the accessibility of the new town centre at Burntwood should be assessed as part of the plan making process. This Section examines the implications of an enlarged town centre for car travel and sustainability issues including the extent to which an enlarged centre would reduce or increase the need to travel for shopping.

7.32 The starting point in looking at accessibility and sustainability is to examine existing shopping patterns in the Burntwood area. The analysis of the household survey data at the beginning of this Section shows that in food shopping the vast majority of shoppers using the foodstores in Burntwood town centre live in Burntwood. Relatively few live in Walsall District (Brownhills area) or Cannock Chase District (primarily Norton Canes and Rawnsley). For non-food shopping a slightly higher proportion of shoppers in Burntwood live in the Cannock Chase wards but there is again a low proportion from the Walsall wards. The results confirm that the primary catchment area of Burntwood is the Burntwood urban area and that the Brownhills/Norton Canes/Rawnsley area is a more secondary catchment area. However, some shoppers from the nearby residential areas of Walsall and Cannock Chase Districts do visit Burntwood town centre and it can be expected that a higher proportion will do so in the future if new shopping development takes place in Burntwood.

Public Transport Accessibility of Burntwood town centre

Rail Services

7.33 There are no direct rail services to Burntwood. The nearest access to rail services from Sankey's Corner is provided at Lichfield City railway station. Central Trains provide return journeys to Lichfield from Birmingham New Street, Sutton Coldfield and Shenstone. This is a frequent service which visits Lichfield City station four times hourly Monday-Friday, with reduced hourly services on Saturday and Sunday. Daily bus services to Birmingham (X55) and Stafford (832/835) also provide mainline rail links. These rail services can be reached via bus services directly to and from Sankey's Corner which embark from Lichfield bus station, directly opposite the railway station on Birmingham Road.

Bus Services

7.34 The key daily bus services to/from Sankey's Corner are listed below.

Service	Route	Mon - Fri	Sat	Sun
60	Lichfield - Swan Island - Chasetown - Sankey's Corner -Norton Canes - Hednesford –Cannock	2 per hour (7am - 6.10pm) then 1 per hour until 11.05 pm	2 per hour (7am - 6.10pm) then 1 per hour until 11.05 pm	No Service
61	Lichfield - Swan Island - Sankey's Corner - Chasetown - Brownhills - Walsall Wood – Walsall	2 per hour (8.30am -5.45pm)	2 per hour (8.30am -5.45pm)	No Service
62	Lichfield - Swan Island - Sankey's Corner - Prospect Village - Rawnsley - Hednesford – Cannock	2 per hour (7.40am - 4.20 pm) then 1 per hour until 6.35 pm	2 per hour (7.40am - 4.20 pm) then 1 per hour until 6.35 pm	No Service
394	Walsall - Walsall Wood - Brownhills - Chasetown - Sankeys Corner - Burntwood Church	1 per hour (6.10 pm - 10.10 pm)	1 per hour (6.10 pm - 10.10 pm)	1 per hour (10.10 am - 2.10 pm) then 2 per hour until 10.10 pm
395	Walsall - Rushall - Pelsall - Brownhills - Chasetown - Burntwood (White Swan)	2 per hour (6.45 am - 5.45 pm)	2 per hour (6.45 am - 5.45 pm)	No Service

7.35 There are five regular bus services to Sankey's Corner and other parts of Burntwood to/from Lichfield, Norton Canes, Hednesford, Cannock, Brownhills, Walsall Wood and Walsall. These services also provide services to/from outlying rural towns and remoter settlements in Lichfield, Walsall and Cannock Chase Districts. Burntwood can readily be accessed by bus from Norton Canes, Brownhills and other settlements in the secondary catchment area. The frequency of these services could be increased if there is demand in the future.

Matters relevant to Neighbouring Districts

7.36 In the preparation of this report England & Lyle have had consultations with officers of Walsall and Cannock Chase District Councils about implications of proposals for further retail development in Burntwood on centres in these neighbouring Districts.

<u>Cannock Chase District</u>

7.37 The dominant centre in Cannock Chase District is Cannock town centre with a gross retail floorspace of about 49,000 sq.m. It is larger than Lichfield city centre. Rugeley and Hednesford are smaller centres with a more localised role. All these centres lie outside of the primary catchment areas of Lichfield and Burntwood. There is also a district centre at Hawks Green including a Tesco store. Cannock has three out-of-centre retail parks at Linkway, Vine Lane and the Orbital Centre.

7.38 The Council has suggested that the appropriate figure for additional retail development in Cannock in the RSS would be 40,000 sq.m. for retail and leisure, of which approximately 29,000 sq.m. is for retail development including 7,000 sq.m. in commitments. There is potential for redevelopment in the town centre. An expansion of the town centre boundary is proposed in the LDF. A retail study commissioned by the Council identifies the need for a new medium sized supermarket in Rugeley to reduce leakage to Stafford and Lichfield.

7.39 Cannock Chase Council recognises that Burntwood is a centre that should meet local needs, like Rugeley. There is no conflict between Rugeley and Burntwood in relation to comparison goods. The Council have concerns about the future role of Burntwood centre in terms of its impact on Cannock which is a higher order centre in the retail hierarchy but this would not be an issue as long as the scale of development in Burntwood is such as to meet local needs. Burntwood is not likely to draw additional trade from the Heath Hayes area of Cannock because it is much more accessible to Cannock town centre. There are bus services from Norton Canes to Burntwood and there is potential for people from Norton Canes to make shopping trips to Burntwood by public transport.

<u>Walsall District</u>

7.40 Walsall town centre is the main town centre in Walsall District. There are several district centres, of which the nearest to Lichfield District are Brownhills and Aldridge. Walsall is a sub-regional centre with about 115,000 sq.m. gross retail floorspace, almost 4 times as much as in Lichfield city centre. It is particularly well provided for in convenience goods. A retail study in 2001 showed that capacity for comparison goods to

2011 would be largely met by the new Crown Wharf scheme on the edge of the town centre, which opened in 2001. This scheme has never been fully let and still has vacant units. The Council has concerns about the possible implications of an enlarged town centre in Burntwood because it could draw trade in comparison goods from the Walsall catchment. There are already threats to the vitality and viability of Walsall town centre because of new retail developments planned in Birmingham and other centres in the West Midlands, including the Birmingham Road redevelopment scheme in Lichfield. The Council acknowledges that the scale of development approved in Burntwood is consistent with meeting local needs but any further large-scale retail development may not be appropriate if it competes with Walsall town centre.

7.41 Brownhills is a district centre with about 21,400 sq.m. gross retail floorspace. It is not performing particularly well and has a high vacancy rate. The Council have evidence to show that Brownhills has a very limited catchment area. It does not draw very much trade from beyond the Brownhills urban area. Residents of Brownhills do not shop in Burntwood to any extent. Brownhills is a centre that should continue to meet local needs, just as Burntwood should meet its own local needs. The Council’s view is that would not be acceptable for shopping in Burntwood to increase its market share of trade from the Brownhills area. Lichfield Council should wait to see what happens after the development of the LCP scheme in Burntwood before allowing any further retailing to be developed.

7.42 Walsall Council do not regard Burntwood as a very sustainable location for large-scale retail development. There is a risk that new development in Burntwood could increase car-borne trade from areas such as Brownhills. However, this report shows that areas in the secondary catchment area of Burntwood are reasonably accessible by public transport from Brownhills and other outlying settlements. Service frequencies could be improved to meet future demand.

7.43 The figures in Appendix 14A of this report show the predicted trading impact of the LCP proposals in Burntwood together with the Morrisons extension in comparison goods. The table shows a total clawback of leakage of about £24m in 2016 which represents a reduction in existing leakage of 11% (leakage in comparison goods expenditure from the Burntwood catchment area in 2006 is £214m – Appendix 4D). Reducing leakage in this way is a sustainable objective. It represents a reduction in longer distance car travel to Walsall, Cannock and other centres, and this clawback can be achieved without any significant trade diversion from Walsall and other centres. In Appendix 14B we predict a cumulative clawback of £39m in 2026 if further retail development on a modest scale takes place in Burntwood, in line with our assessment of capacity. There would be additional benefits in reduced travel distances and sustainability.

7.44 In response to the concerns of Cannock Chase and Walsall Councils we are confident that the scale of development we have identified in Burntwood is appropriate to the role of the centre in meeting local needs. Most of the spending in the expanded centre would be generated within the Burntwood urban area and there would be clawback of leakage in comparison goods. Burntwood is accessible by bus from the local catchment and the centre will not be dependent on car-borne trade.

8. FLOORSPACE LIMITS

8.1 PPS6 advises that in development plan documents local planning authorities may set out an indicative upper limit for the scale of development (defined in terms of gross floorspace) which is likely to be acceptable in particular centres. Following the Core Strategy Examination the Inspector suggested that there may be some merit in having indicative upper levels of floorspace in Lichfield and Burntwood centres. In Lichfield the amount of floorspace will be limited by the physical capacity of the centre. In the case of Burntwood it is necessary to assess whether there should there be an upper limit on the size of retail development and if so what is an appropriate floorspace limit.

8.2 In both centres any floorspace limit could be based on the amount of existing retail floorspace plus commitments and the potential for new floorspace. However, such a limit could be difficult to monitor because it requires reliable survey data on existing floorspace. Although we have provided a survey base including gross shopping floorspace in the Background Retail Review, existing floorspace in retail use constantly changes. We would advise that it is preferable to set floorspace limits that are based on the amount of new retail floorspace that should be allowed. This is an approach that is in line with the approach adopted in RSS policies and in the Regional Centres Study which gives guidance on the scale of new development.

Lichfield

8.3 In Lichfield an appropriate floorspace limit should include the committed Friarsgate redevelopment scheme with a floorspace of 22,000 sq.m. gross, other commitments such as Tesco and the additional floorspace capacity we have identified by 2026 which could be accommodated on sites within the city centre (see Section 6). We would suggest that the LDF Core Strategy refers to a floorspace limit of 42,000 sq.m. gross in total, including 35,000 sq.m. gross in comparison goods. This floorspace limit includes the recently developed Lidl supermarket and the replacement Tesco store which is under construction. It would be logical to include the new Tesco store within the city centre boundary because of its proximity and functional linkages with the city centre. In practice it will be difficult to find a site within the city centre to accommodate the further convenience goods capacity in addition to Tesco. We have assessed capacity across the Lichfield catchment area and we would advise that the potential for new floorspace should apply to the urban area as a whole, not just the city centre. Some of the additional floorspace capacity is in bulky goods (up to 3,500 sq.m. gross) and this would also have to be accommodated outside the city centre.

8.4 The floorspace limits for Lichfield are summarised below (figures are rounded).

Floorspace (sq.m. gross)	Convenience	Comparison	Total
Friarsgate scheme	1,500	20,500	22,000
replacement Tesco	2,000	3,000	5,000
Lidl	1,500	-	1,500
Vulcan Road	-	3,000	3,000
additional capacity	2,000	8,500	10,500
Total	7,000	35,000	42,000

8.5 A floorspace limit of 35,000 for new retail development in comparison goods in Lichfield would comply with the revised draft RSS Policy PA11 on strategic town centres which indicates that these centres will be the focus for major retail development (in comparison goods) of more than 10,000 sq.m. gross floorspace. There is no upper floorspace limit in the policy. The Friarsgate redevelopment scheme has been approved and will not be completed until between 2011 and 2016. The proposed limit allows for an additional 13,000 sq.m. of comparison retail floorspace (including bulky goods) over and above that committed at Friarsgate in the LDF period to 2026. This scale of development is consistent with the requirements for new comparison retail floorspace set out in Policy PA12A of the revised draft RSS. We believe this is an appropriate scale of further development for Lichfield.

Burntwood

8.6 In Burntwood town centre we believe it is also necessary to have an upper limit on the size of retail development. At the Examination of the Core Strategy the Inspector thought there were benefits in having an upper limit for the scale of growth in comparison goods but in the Inspector's view, there was not the evidence to determine what is an appropriate upper limit. London and Cambridge Properties (LCP), the major landowner of the new town centre in Burntwood, indicated that was a capacity of around 17,000 sq.m. gross by 2011 in Burntwood. LCP suggested adopting a phased approach to the development of the town centre with a review after 2011. This is a cautious approach and the Inspector saw merit in adopting a phased approach given the uncertainties associated with planning such a large change in the scale of retailing at Burntwood. He said that longer term growth would have to be justified in relation to local needs at that time.

8.7 In Burntwood an appropriate floorspace limit should include the committed LCP scheme which has gross floorspace of about 9,000 sq.m., the Morrisons extension with a gross floorspace of 1,100 sq.m., and the additional floorspace capacity of 3,200-6,000 sq.m. gross we have identified by 2026 which could be accommodated on the Olaf Johnson site (see Section 7). The total committed floorspace is about 10,000 sq.m. gross. The maximum floorspace capacity we have assessed is about 3,000 sq.m. gross in convenience goods and 3,000 sq.m. gross in comparison goods. We would suggest that the LDF Core Strategy refers to a floorspace limit of 16,000 sq.m. gross, including both convenience and comparison goods, which includes the Hoardings site. The amount of floorspace represented by comparison goods is about 13,000 sq.m. gross.

8.8 The floorspace limits for Burntwood are summarised below (figures are rounded).

Floorspace (sq.m. gross)	Convenience	Comparison	Total
LCP scheme	-	9,000	9,000
Morrisons extension	-	1,000	1,000
additional capacity	3,000	3,000	6,000
Total	3,000	13,000	16,000

8.9 RSS Revised Draft Policy PA12B on Non-Strategic centres states that local authorities should identify and develop policies for centres that meet local needs for convenience shopping, local service provision and day-to-day comparison shopping. The proposed policy does not preclude new development of more than 10,000 sq.m. gross in comparison goods but it requires any proposals for a significant increase in comparison retail floorspace to be accompanied by supporting evidence. In this report we have demonstrated that the scale of development proposed at Burntwood is appropriate in the context of need and physical capacity. Of the total floorspace limit of 16,000 sq.m. gross we suggest that 13,000 sq.m. gross would be in comparison goods. In relation to the criteria in draft RSS Policy PA12B we would advise that:

- there is a clear need for the scale of development proposed
- the proposal would not put at risk the delivery of development within any nearby strategic centre (Lichfield, Cannock or Walsall), and
- there is a satisfactory public transport access Burntwood town centre.

8.10 In the Examination report the Inspector questioned whether the scale of development suggested for Burntwood could truly be said to meet “local needs”. We are convinced that the scale of development we have proposed in Burntwood, and the corresponding upper floorspace limit, reflect local needs. Burntwood would not change its status in the retail hierarchy. It would not become a strategic centre but it would have an enhanced role as a town centre, better serving the local needs of residents of Burntwood and the surrounding area.

9. POLICY ON SMALLER CENTRES

9.1 PPS6 supports a network of local centres to provide easily accessible shopping to meet people's day-to-day needs. It recommends a balanced network of centres. Local authorities should take a positive approach to strengthening local centres and planning for local shops. The need for local shops and services is equally important in urban and rural areas.

9.2 The evidence base for the Core Strategy needs to consider what should be the policy for district and local centres. We have examined if there is a need for new local centres in the District and where should they be provided in the context of housing growth. In Section 4 we advised on the hierarchy of centres in Lichfield District. In addition to the role of Lichfield city centre as a Large Town Centre and Burntwood town centre as a Smaller Town Centre, our advice on the designation of local centres is as follows:

Large Local Centre	Chasetown
Smaller Local Centres	Boley Park, Curborough, Netherstowe, Weston Road (Lichfield); Morley Road, Parkhill Road, Swan Island (Burntwood)
Village Centres	Alrewas, Armitage, Fazeley, Shenstone, Stonnal, Whittington

9.3 These centres require policies to protect and enhance local and village centres so that they provide a level of services that will fully meet the needs of the local population. The existing Local Plan Policy S.2 on neighbourhood centres needs to be strengthened to ensure that an adequate range of local shopping and services is maintained and that improvements in shops and services are encouraged. We suggest that the same policy protection should apply to all local centres.

9.4 PPS6 states that new centres should be designated through the plan-making process where the need for them has been established, such as in areas of significant growth or where there are deficiencies in the existing network of centres. In our view the only need for new centres in Lichfield would arise where there is significant new residential development. The recently built Waitrose supermarket in the Walsall Road area of Lichfield provides local shopping serving a new residential development. We are aware that the Council has identified an option of developing an expanded settlement at Fradley, north of Lichfield. The size of this development has not yet been decided and will depend on the LDF housing requirements. The adopted Local Plan refers to the possibility of a new local centre in Fradley to serve the growing population there.

9.5 There is capacity in our need assessment for a new centre in Fradley. Appendix 5A shows a floorspace capacity in convenience goods in the Lichfield catchment area of 1,800 - 4,900 sq.m. gross. Some of the capacity we have identified in the Lichfield catchment area could be accommodated at Fradley. It does not all have to be met in the Lichfield urban area. To assess how much retail floorspace would be needed to cater for a significant growth in population in Fradley we have assumed that there may be 1,000 new dwellings in Fradley and a population growth of 2,500. This is in addition to the existing population in Fradley which is estimated to be about 1,000. A broad rule of thumb that has been used in previous retail studies to estimate the floorspace requirement in a new local centre is to apply an average ratio of 2 sq.ft. gross per person. This would suggest a floorspace requirement of 7,000 sq.ft (650 sq.m. gross) which would represent total convenience and comparison floorspace. There would be sufficient capacity in the Lichfield catchment to support this level of floorspace in Fradley.

9.6 There is already a planning consent for 1,100 sq.m. gross retail floorspace in Fradley which we have taken into account as a commitment in the capacity analysis. This scale of development should be sufficient to meet the requirements of a local centre in Fradley. It should be classed as a local centre (village centre) in the retail hierarchy.

APPENDIX 1: POPULATION

	2006	2011	2016	2021	2026
Burntwood wards					
All Saints	3,739	3,797	3,856	3,916	3,968
Boney Hay	3,396	3,449	3,502	3,556	3,604
Chase Terrace	5,192	5,273	5,355	5,436	5,510
Chasetown	3,706	3,763	3,821	3,881	3,932
Hammerwich	3,551	3,606	3,662	3,719	3,769
Highfield	3,289	3,340	3,391	3,444	3,490
Burntwood Central	3,353	3,406	3,458	3,512	3,559
Summerfield	4,191	4,256	4,322	4,389	4,448
Sub-total	30,416	30,891	31,366	31,854	32,279
Lichfield wards					
Boley Park	5,078	5,409	5,740	6,080	6,376
Chadsmead	3,795	4,043	4,290	4,544	4,766
Curborough	5,395	5,747	6,099	6,461	6,776
Leomansley	4,265	4,543	4,821	5,106	5,355
St Johns	5,311	5,658	6,004	6,359	6,669
Stowe	5,291	5,636	5,981	6,335	6,644
Sub-total	29,136	31,036	32,936	34,886	36,586
Northern Rural wards					
Armitage with Handsacre	5,304	5,380	5,456	5,533	5,601
Colton and Mavesyn Ridware	1,803	2,278	2,753	3,241	3,666
Kings Bromley	1,734	1,734	1,734	1,734	1,734
Longdon	1,892	1,892	1,892	1,892	1,892
Sub Total	10,733	11,284	11,835	12,400	12,893
Eastern Rural wards					
Alrewas and Fradley	4,852	5,308	5,764	6,232	6,640
Mease and Tame	3,503	3,503	3,503	3,503	3,503
Whittington	3,477	3,553	3,629	3,707	3,775
Sub Total	11,832	12,364	12,896	13,442	13,918
Southern Rural wards					
Bourne Vale	2,052	2,052	2,052	2,052	2,052
Fazeley	4,824	5,014	5,204	5,399	5,539
Little Aston	2,894	2,970	3,046	3,124	3,192
Shenstone	3,279	3,355	3,431	3,509	3,577
Stonnall	1,534	1,534	1,534	1,534	1,534
Sub Total	14,583	14,925	15,267	15,618	15,924
Lichfield District Total	**96,700**	**100,500**	**104,300**	**108,200**	**111,600**
Walsall District wards					
Aldridge North and Walsall Wood	12,693	12,853	13,057	13,272	13,466
Brownhills	12,399	12,555	12,755	12,964	13,154
Sub Total	25,092	25,408	25,812	26,236	26,620
Cannock Chase District wards					
Hawks Green	6,454	6,659	6,872	7,077	7,248
Heath Hayes East and Wimblebury	5,941	6,130	6,325	6,514	6,672
Norton Canes	6,536	6,744	6,959	7,167	7,340
Rawnsley	5,054	5,215	5,381	5,542	5,676
Sub Total	23,985	24,748	25,537	26,300	26,935
Study Area Total	**145,777**	**150,656**	**155,649**	**160,736**	**165,155**
Sources:					
2006 - ward figures from GL Hearn Retail Study projected to 2006 using changes at District level					
2006-2026:					
Lichfield District total based on Staffordshire County Council projections for Lichfield District					
Lichfield wards based on LDF Core Strategy distribution of housing growth between zones					
Walsall wards - growth rate based on ONS 2006-based subnational population projections for Walsall District					

APPENDIX 2: EXPENDITURE PER CAPITA

APPENDIX 2A: CONVENIENCE GOODS EXPENDITURE PER CAPITA								
	2001	2001	2004	2006	2011	2016	2021	2026
		(excluding special forms of trading)						
	£	£	£	£	£	£	£	£
Burntwood wards								
All Saints	1,555	1,532	1,598	1,706	1,788	1,909	2,045	2,191
Boney Hay	1,476	1,454	1,517	1,619	1,697	1,812	1,941	2,080
Chase Terrace	1,547	1,524	1,590	1,697	1,778	1,899	2,035	2,180
Chasetown	1,421	1,400	1,461	1,559	1,634	1,745	1,869	2,003
Hammerwich	1,611	1,587	1,656	1,767	1,852	1,978	2,119	2,270
Highfield	1,628	1,604	1,673	1,786	1,872	1,999	2,142	2,294
Burntwood Central	1,590	1,566	1,634	1,743	1,827	1,951	2,091	2,240
Summerfield	1,444	1,422	1,484	1,583	1,659	1,772	1,899	2,034
Lichfield wards								
Boley Park	1,615	1,591	1,660	1,771	1,856	1,983	2,124	2,276
Chadsmead	1,366	1,346	1,404	1,498	1,571	1,677	1,797	1,925
Curborough	1,427	1,406	1,467	1,565	1,641	1,752	1,877	2,011
Leomansley	1,581	1,557	1,624	1,733	1,817	1,940	2,079	2,227
St Johns	1,545	1,522	1,588	1,694	1,776	1,897	2,032	2,177
Stowe	1,511	1,488	1,552	1,657	1,736	1,854	1,987	2,129
Northern Rural wards								
Armitage with Handsacre	1,526	1,503	1,568	1,673	1,754	1,873	2,007	2,150
Colton and Mavesyn Ridware	1,555	1,532	1,598	1,706	1,788	1,909	2,045	2,191
Kings Bromley	1,559	1,536	1,603	1,710	1,792	1,914	2,051	2,197
Longdon	1,650	1,625	1,695	1,809	1,896	2,025	2,170	2,324
Eastern Rural wards								
Alrewas and Fradley	1,546	1,523	1,589	1,695	1,777	1,898	2,033	2,179
Mease and Tame	1,585	1,561	1,629	1,738	1,821	1,945	2,084	2,233
Whittington	1,585	1,561	1,629	1,738	1,821	1,945	2,084	2,233
Southern Rural wards								
Bourne Vale	1,557	1,534	1,600	1,708	1,790	1,912	2,048	2,194
Fazeley	1,486	1,464	1,527	1,630	1,708	1,824	1,955	2,094
Little Aston	1,552	1,529	1,595	1,702	1,784	1,905	2,041	2,187
Shenstone	1,578	1,554	1,621	1,730	1,813	1,936	2,075	2,223
Stonnall	1,616	1,592	1,661	1,772	1,858	1,984	2,126	2,277
Walsall District wards								
Aldridge North and Walsall Wood	1,576	1,552	1,619	1,728	1,811	1,934	2,072	2,220
Brownhills	1,514	1,491	1,556	1,660	1,740	1,858	1,991	2,133
Cannock Chase District wards								
Hawks Green	1,554	1,531	1,597	1,704	1,786	1,908	2,044	2,190
Heath Hayes East and Wimblebury	1,536	1,513	1,579	1,684	1,765	1,885	2,020	2,164
Norton Canes	1,517	1,494	1,559	1,663	1,743	1,862	1,995	2,137
Rawnsley	1,502	1,479	1,543	1,647	1,726	1,843	1,975	2,116
Notes								
2001 prices								
2001 - GL Hearn Retail Study adjusted to exclude special forms of trading @ 1.5%								
2004 - actual growth 2001-2004 = 5.4% (MapInfo Brief 08/2)								
2006 - actual growth 2004-2006 = 1.8% (MapInfo Brief 08/2)								
2011 - forecast growth 2006-2011 = 2.2% p.a. to 2008 then 1.5% p.a. to 2011								
2016 to 2026 - forecast growth 2011-2026 = 1.5% p.a.								
Special Forms of Trading (Experian Retail Planner Briefing Note 6.0, October 2008) projected to 2026								
		2001	2004	2006	2011	2016	2021	2026
convenience goods		1.5%	2.5%	3.4%	7.3%	8.1%	8.6%	9.1%

APPENDIX 2: EXPENDITURE PER CAPITA

APPENDIX 2B: COMPARISON GOODS EXPENDITURE PER CAPITA

	2001	2001	2004	2006	2011	2016	2021	2026
		(excluding special forms of trading)						
	£	£	£	£	£	£	£	£
Burntwood wards								
All Saints	2,222	2,066	2,622	2,813	3,300	3,954	4,810	5,875
Boney Hay	2,049	1,906	2,419	2,595	3,045	3,648	4,438	5,399
Chase Terrace	2,240	2,083	2,644	2,836	3,327	3,986	4,850	5,901
Chasetown	1,951	1,814	2,303	2,470	2,898	3,472	4,224	5,139
Hammerwich	2,322	2,159	2,740	2,939	3,449	4,132	5,027	6,116
Highfield	2,503	2,328	2,955	3,169	3,719	4,455	5,421	6,595
Burntwood Central	2,271	2,112	2,681	2,875	3,374	4,042	4,918	5,983
Summerfield	1,999	1,859	2,360	2,531	2,970	3,558	4,329	5,266
Lichfield wards								
Boley Park	2,494	2,319	2,944	3,157	3,704	4,438	5,400	6,569
Chadsmead	1,901	1,768	2,244	2,407	2,824	3,384	4,117	5,009
Curborough	1,997	1,857	2,357	2,528	2,966	3,554	4,324	5,261
Leomansley	2,326	2,163	2,746	2,945	3,455	4,140	5,036	6,127
St Johns	2,339	2,175	2,761	2,961	3,474	4,162	5,064	6,161
Stowe	2,159	2,008	2,549	2,734	3,208	3,843	4,675	5,688
Northern Rural wards								
Armitage with Handsacre	2,215	2,060	2,615	2,805	3,291	3,942	4,797	5,836
Colton and Mavesyn Ridware	2,289	2,129	2,702	2,899	3,401	4,074	4,957	6,031
Kings Bromley	2,347	2,183	2,771	2,972	3,487	4,178	5,083	6,184
Longdon	2,504	2,329	2,956	3,171	3,720	4,457	5,423	6,598
Eastern Rural wards								
Alrewas and Fradley	2,325	2,162	2,744	2,943	3,454	4,138	5,034	6,125
Mease and Tame	2,381	2,214	2,810	3,014	3,537	4,237	5,155	6,272
Whittington	2,428	2,258	2,866	3,074	3,607	4,321	5,258	6,397
Southern Rural wards								
Bourne Vale	2,271	2,112	2,681	2,875	3,374	4,042	4,918	5,983
Fazeley	2,084	1,938	2,460	2,638	3,096	3,709	4,512	5,490
Little Aston	2,397	2,229	2,829	3,035	3,561	4,266	5,190	6,314
Shenstone	2,383	2,216	2,813	3,017	3,540	4,241	5,160	6,278
Stonnall	2,442	2,271	2,883	3,092	3,628	4,346	5,288	6,433
Walsall District wards								
Aldridge North and Walsall Wood	2,243	2,086	2,648	2,840	3,332	3,992	4,857	5,909
Brownhills	2,098	1,951	2,476	2,656	3,117	3,734	4,543	5,527
Cannock Chase District wards								
Hawks Green	2,387	2,220	2,818	3,022	3,546	4,249	5,169	6,289
Heath Hayes East and Wimblebury	2,219	2,064	2,620	2,810	3,297	3,950	4,806	5,847
Norton Canes	2,113	1,965	2,494	2,675	3,139	3,761	4,575	5,567
Rawnsley	2,160	2,009	2,550	2,735	3,209	3,845	4,678	5,691

Notes

2001 prices

2001 - GL Hearn Retail Study adjusted to exclude special forms of trading @ 7.0%

2004 - actual growth 2001-2004 = 27.1% (MapInfo Brief 08/2)

2006 - actual growth 2004-2006 = 8.7% (MapInfo Brief 08/2)

2011 - forecast growth 2006-2011 = 5.4% p.a. to 2008 then 3.8% p.a. to 2011

2016 - forecast growth 2011-2016 = 3.8% p.a.

2021 to 2026 - forecast growth 2016-2026 = 4.0% p.a.

Special Forms of Trading (Experian Retail Planner Briefing Note 6.0, October 2008) projected to 2026

		2001	2004	2006	2011	2016	2021	2026
convenience goods		7.0%	7.1%	8.3%	13.4%	13.9%	13.9%	13.9%

APPENDIX 3: TOTAL EXPENDITURE

APPENDIX 3A: TOTAL CONVENIENCE GOODS EXPENDITURE

£ million in 2001 prices (excluding Special Forms of Trading)

	2006	2011	2016	2021	2026
Burntwood wards					
All Saints	6.38	6.79	7.36	8.01	8.70
Boney Hay	5.50	5.85	6.34	6.90	7.50
Chase Terrace	8.81	9.38	10.17	11.06	12.01
Chasetown	5.78	6.15	6.67	7.25	7.88
Hammerwich	6.27	6.68	7.24	7.88	8.56
Highfield	5.87	6.25	6.78	7.38	8.01
Burntwood Central	5.85	6.22	6.75	7.34	7.97
Summerfield	6.63	7.06	7.66	8.33	9.05
Sub Total	51.08	54.38	58.97	64.16	69.66
Lichfield wards					
Boley Park	8.99	10.04	11.38	12.92	14.51
Chadsmead	5.69	6.35	7.20	8.17	9.18
Curborough	8.44	9.43	10.69	12.13	13.63
Leomansley	7.39	8.25	9.35	10.61	11.93
St Johns	9.00	10.05	11.39	12.92	14.52
Stowe	8.77	9.79	11.09	12.59	14.14
Sub Total	48.28	53.91	61.09	69.33	77.90
Northern Rural wards					
Armitage with Handsacre	8.88	9.43	10.22	11.10	12.04
Colton and Mavesyn Ridware	3.07	4.07	5.26	6.63	8.03
Kings Bromley	2.97	3.11	3.32	3.56	3.81
Longdon	3.42	3.59	3.83	4.10	4.40
Sub Total	18.34	20.20	22.62	25.39	28.28
Eastern Rural wards					
Alrewas and Fradley	8.23	9.43	10.94	12.67	14.47
Mease and Tame	6.09	6.38	6.81	7.30	7.82
Whittington	6.04	6.47	7.06	7.73	8.43
Sub Total	20.36	22.28	24.81	27.70	30.72
Southern Rural wards					
Bourne Vale	3.50	3.67	3.92	4.20	4.50
Fazeley	7.86	8.56	9.49	10.55	11.60
Little Aston	4.93	5.30	5.80	6.38	6.98
Shenstone	5.67	6.08	6.64	7.28	7.95
Stonnall	2.72	2.85	3.04	3.26	3.49
Sub Total	24.68	26.47	28.91	31.67	34.53
Walsall District wards					
Aldridge North and Walsall Wood	21.93	23.28	25.25	27.50	29.90
Brownhills	20.58	21.84	23.70	25.81	28.06
Sub Total	42.51	45.12	48.95	53.31	57.95
Cannock Chase District wards					
Hawks Green	11.00	11.90	13.11	14.47	15.87
Heath Hayes East and Wimblebury	10.01	10.82	11.93	13.16	14.44
Norton Canes	10.87	11.76	12.96	14.30	15.69
Rawnsley	8.32	9.00	9.92	10.94	12.01
Sub Total	40.20	43.47	47.91	52.86	58.01
Study Area Total	**245.46**	**265.83**	**293.27**	**324.44**	**357.05**

APPENDIX 3: TOTAL EXPENDITURE

APPENDIX 3B: TOTAL COMPARISON GOODS EXPENDITURE

£ million in 2001 prices (excluding Special Forms of Trading)

	2006	2011	2016	2021	2026
Burntwood wards					
All Saints	10.52	12.53	15.24	18.84	23.31
Boney Hay	8.81	10.50	12.77	15.78	19.46
Chase Terrace	14.72	17.55	21.35	26.37	32.51
Chasetown	9.15	10.91	13.27	16.39	20.21
Hammerwich	10.44	12.44	15.13	18.70	23.05
Highfield	10.42	12.42	15.11	18.67	23.02
Burntwood Central	9.64	11.49	13.98	17.27	21.29
Summerfield	10.61	12.64	15.38	19.00	23.42
Sub Total	84.31	100.47	122.22	151.01	186.27
Lichfield wards					
Boley Park	16.03	20.04	25.48	32.83	41.89
Chadsmead	9.14	11.42	14.52	18.71	23.87
Curborough	13.64	17.05	21.68	27.94	35.65
Leomansley	12.56	15.70	19.96	25.72	32.81
St Johns	15.73	19.66	24.99	32.21	41.09
Stowe	14.47	18.08	22.99	29.62	37.79
Sub Total	81.56	101.94	129.60	167.02	213.10
Northern Rural wards					
Armitage with Handsacre	14.88	17.70	21.51	26.54	32.69
Colton and Mavesyn Ridware	5.23	7.75	11.22	16.07	22.11
Kings Bromley	5.15	6.05	7.24	8.81	10.72
Longdon	6.00	7.04	8.43	10.26	12.48
Sub Total	31.25	38.54	48.40	61.68	78.00
Eastern Rural wards					
Alrewas and Fradley	14.28	18.33	23.85	31.37	40.67
Mease and Tame	10.56	12.39	14.84	18.06	21.97
Whittington	10.69	12.82	15.68	19.49	24.15
Sub Total	35.53	43.54	54.37	68.92	86.79
Southern Rural wards					
Bourne Vale	5.90	6.92	8.29	10.09	12.28
Fazeley	12.73	15.52	19.30	24.36	30.41
Little Aston	8.78	10.58	12.99	16.21	20.16
Shenstone	9.89	11.88	14.55	18.11	22.46
Stonnall	4.74	5.56	6.67	8.11	9.87
Sub Total	42.05	50.46	61.81	76.88	95.17
Walsall District wards					
Aldridge North and Walsall Wood	36.05	42.83	52.13	64.46	79.58
Brownhills	32.93	39.13	47.62	58.89	72.70
Sub Total	68.98	81.96	99.75	123.36	152.28
Cannock Chase District wards					
Hawks Green	19.51	23.62	29.19	36.58	45.58
Heath Hayes East and Wimblebury	16.69	20.21	24.99	31.31	39.01
Norton Canes	17.49	21.17	26.17	32.79	40.86
Rawnsley	13.82	16.74	20.69	25.92	32.30
Sub Total	67.51	81.73	101.04	126.60	157.75
Study Area Total	**411.19**	**498.63**	**617.20**	**775.47**	**969.36**

APPENDIX 4: CAPACITY ANALYSIS

APPENDIX 4A: CAPACITY ANALYSIS, CONVENIENCE GOODS						
Lichfield Catchment Area (2001 prices)						
	2004	**2006**	**2011**	**2016**	**2021**	**2026**
Residents' expenditure in catchment area (£m)						
Primary catchment						
Lichfield wards	44.40	48.28	53.91	61.09	69.33	77.90
Secondary catchment						
Burntwood wards	46.97	51.08	54.38	58.97	64.16	69.66
Northern Rural wards	16.86	18.34	20.20	22.62	25.39	28.28
Eastern Rural wards	18.72	20.36	22.28	24.81	27.70	30.72
Southern Rural wards	22.70	24.68	26.47	28.91	31.67	24.53
Secondary catchment total	105.25	114.46	123.33	135.31	148.92	153.19
Total expenditure from catchment (£m)	149.65	162.74	177.24	196.40	218.25	231.09
Turnover in Lichfield (£m) [1]						
from primary catchment	37.21	42.07				
from secondary catchment	27.77	31.40				
total turnover from catchment area	64.98	73.47				
inflow (additional 5% of turnover)	3.25	3.67				
total turnover in Lichfield	68.23	77.14				
Retention levels [2]	existing		forecasts			
primary catchment	84%	87%	90%	94%	94%	94%
secondary catchment	26%	27%	30%	30%	30%	30%
overall retention	43%	45%	48%	50%	50%	52%
Expenditure available to be spent in Lichfield (£m)						
from primary catchment			48.52	57.42	65.17	73.23
from secondary catchment			37.00	40.59	44.68	45.96
total expenditure available			85.52	98.02	109.85	119.18
Future turnover in Lichfield from catchment (£m) [3]			75.70	78.00	80.37	82.81
Surplus expenditure capacity (£m)			9.82	20.02	29.48	36.38
Turnover of commitments (£m) [4] [3]			10.14	19.74	20.34	20.96
Residual capacity (£m)			-0.32	0.28	9.14	15.42

[1] Survey-based turnover 2004 from Retail Study increased to 2006
allowing for the development of the new Waitrose supermarket at Walsall Road, Lichfield

Waitrose convenience goods turnover	£17.81m
turnover additional to the catchment (50%)	£8.91m

trade draw from primary and secondary catchments the same as in 2004
[2] assuming an increase in retention based on potential for clawback of leakage
[3] assuming growth in sales densities in convenience goods of 0.6% p.a. (Experian forecast)

[4] Commitments:	sq.m. net	sales	turnover	
(convenience goods only)		per sq.m.	£m	
Morrisons extension, Burntwood	267	£9,360	2.50	
replacement Tesco store, Lichfield	1,289	-	4.61	(additional turnover)
Lidl, Eastern Avenue, Lichfield	630	£2,830	1.78	
Friarsgate, Lichfield	1,000	£9,600	9.60	(after 2011)
Local centre, Fradley	250	£5,000	1.25	

total			19.74			

APPENDIX 4B: CAPACITY ANALYSIS, CONVENIENCE GOODS

Burntwood Catchment Area (2001 prices)

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Burntwood wards	46.97	51.08	54.38	58.97	64.16	69.66
Secondary catchment						
Walsall District wards	40.49	42.51	45.12	48.95	53.31	57.95
Cannock Chase District wards	37.75	40.20	43.47	47.91	52.86	58.01
Secondary catchment total	78.24	82.71	88.59	96.86	106.17	115.96
Total expenditure from catchment (£m)	125.21	133.79	142.97	155.83	170.33	185.62
Turnover in Burntwood (£m) [1]						
from primary catchment	23.44	25.49				
from secondary catchment	3.44	3.61				
total turnover from catchment area	26.88	29.10				
inflow (additional 5% of turnover)	1.34	1.46				
total turnover in Burntwood	28.22	30.56				
Retention levels [2]	existing		forecasts			
primary catchment	50%	50%	55%	55%	55%	55%
secondary catchment	4%	4%	5%	5%	5%	5%
overall retention	21%	22%	24%	24%	24%	24%
Expenditure available to be spent in Burntwood (£m)						
from primary catchment			29.91	32.43	35.29	38.31
from secondary catchment			4.43	4.84	5.31	5.80
total expenditure available			34.34	37.28	40.60	44.11
Future turnover in Burntwood from catchment (£m) [3]			29.98	30.89	31.83	31.83
Surplus expenditure capacity (£m)			4.35	6.38	8.76	12.28
Turnover of commitments (£m) [4] [3]			2.50	2.58	2.65	2.73
Residual capacity (£m)			1.85	3.81	6.11	9.54
[1] Survey-based turnover 2004 from Retail Study increased to 2006						
in line with expenditure growth in catchment area						
[2] assuming an increase in retention based on potential for clawback of leakage						
[3] assuming growth in sales densities in convenience goods of 0.6% p.a. (Experian forecasts)						
[4] Commitments:	sq.m. net	sales	turnover			
(convenience goods only)		per sq.m.	£m			
Morrisons extension, Burntwood	267	£9,360	2.50			

APPENDIX 4C: CAPACITY ANALYSIS, COMPARISON GOODS

Lichfield Catchment Area (2001 prices)

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Lichfield wards	74.25	81.56	101.94	129.60	167.02	213.10
Secondary catchment						
Burntwood wards	76.75	84.31	100.47	122.22	151.01	186.18
Northern Rural wards	28.45	31.25	38.54	48.40	61.68	78.00
Eastern Rural wards	32.35	35.53	43.54	54.37	68.92	86.79
Southern Rural wards	38.28	42.05	50.46	61.81	76.88	95.17
Secondary catchment total	175.83	193.14	233.01	286.80	358.49	446.14
Total expenditure from catchment (£m)	250.08	274.70	334.95	416.40	525.51	659.24
Turnover in Lichfield (£m) [1]						
from primary catchment	33.26	36.54				
from secondary catchment	39.70	43.61				
total turnover from catchment area	72.96	80.14				
inflow (additional 15% of turnover)	10.94	12.02				
total turnover in Lichfield	83.90	92.16				
Retention levels [2]	existing			forecasts		
primary catchment	45%	45%	60%	65%	65%	65%
secondary catchment	23%	23%	30%	35%	35%	35%
overall retention	29%	29%	39%	44%	45%	45%
Expenditure available to be spent in Lichfield (£m)						
from primary catchment			61.16	84.24	108.56	138.52
from secondary catchment			69.90	100.38	125.47	156.15
total expenditure available			131.07	184.62	234.03	294.66
Future turnover in Lichfield from catchment (£m) [3]			89.35	99.63	111.08	123.85
Surplus expenditure capacity (£m)			41.71	84.99	122.96	170.82
Turnover of commitments (£m) [4] [3]			52.63	118.60	132.23	147.43
Residual capacity (£m)			-10.92	-33.61	-9.28	23.39

[1] Survey-based turnover 2004 from Retail Study increased to 2006 in line with expenditure growth in catchment area

[2] assuming an increase in retention based on potential for clawback of leakage

[3] assuming growth in sales densities in comparison goods of 2.2% p.a. (Experian forecasts)

[4] Commitments:	sq.m. net	sales	turnover	
(comparison goods only)		per sq.m.	£m	
Friarsgate, Lichfield	14,586	£4,108	59.92	(after 2011)
replacement Tesco store, Lichfield	2,460	-	13.08	(additional turnover)
Vulcan Road, Lichfield	3,013	£2,627	7.92	
Morrisons extension, Burntwood	534	£5,879	3.14	
Local centre, Fradley	500	£4,000	2.00	
LCP scheme, Burntwood	6,584	£4,025	26.50	
Total	27,677	-	112.55	

APPENDIX 4D: CAPACITY ANALYSIS, COMPARISON GOODS

Burntwood Catchment Area (2001 prices)

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Burntwood wards	76.75	84.31	100.47	122.22	151.01	186.18
Secondary catchment						
Walsall District wards	65.04	68.98	81.96	99.75	123.36	152.28
Cannock Chase District wards	62.76	67.51	81.73	101.04	126.60	157.75
Secondary catchment total	127.80	136.49	163.69	200.79	249.96	310.03
Total expenditure from catchment (£m)	204.55	220.80	264.16	323.01	400.97	496.21
Turnover in Burntwood (£m) [1]						
from primary catchment	3.58	3.98				
from secondary catchment	2.18	2.33				
total turnover from catchment area	5.76	6.31				
inflow (additional 5% of turnover)	0.29	0.32				
total turnover in Burntwood	6.05	6.63				
Retention levels [2]	existing			forecasts		
primary catchment	5%	5%	30%	30%	30%	30%
secondary catchment	2%	2%	4%	4%	4%	4%
overall retention	3%	3%	14%	14%	14%	14%
Expenditure available to be spent in Burntwood (£m)						
from primary catchment			30.14	36.67	45.30	55.85
from secondary catchment			6.55	8.03	10.00	12.40
total expenditure available			36.69	44.70	55.30	68.26
Future turnover in Burntwood from catchment (£m) [3]			7.03	7.84	8.74	9.75
Surplus expenditure capacity (£m)			29.66	36.86	46.56	58.51
Turnover of commitments (£m) [4] [3]			29.64	33.05	36.85	45.80
Residual capacity (£m)			0.02	3.81	9.71	12.70

[1] Survey-based turnover 2004 from Retail Study increased to 2006 in line with expenditure growth in catchment area

[2] assuming an increase in retention based on potential for clawback of leakage

[3] assuming growth in sales densities in comparison goods of 2.2% p.a. (Experian forecasts)

[4] Commitments:	sq.m. net	sales	turnover
(comparison goods only)		per sq.m.	£m
Morrisons extension, Burntwood	534	£5,879	3.14
LCP scheme, Burntwood	6,584	£4,025	26.50
	7,118	-	29.64

APPENDIX 4E: CAPACITY ANALYSIS, BULKY GOODS

Lichfield Catchment Area (2001 prices)

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m) [1]						
Primary catchment						
Lichfield wards	22.87	25.12	31.40	39.92	51.44	65.63
Secondary catchment						
Burntwood wards	23.64	25.97	30.94	37.64	46.51	57.34
Northern Rural wards	8.76	9.63	11.87	14.91	19.00	24.02
Eastern Rural wards	9.96	10.94	13.41	16.75	21.23	26.73
Southern Rural wards	11.79	12.95	15.54	19.04	23.68	29.31
Secondary catchment total	54.16	59.49	71.77	88.33	110.41	137.41
Total expenditure from catchment (£m)	77.02	84.61	103.16	128.25	161.86	203.05
Turnover in Lichfield (£m) [2]						
total bulky goods turnover	13.18	14.48				
Retention level [3]	existing		forecasts			
overall retention level in catchment	17%	17%	20%	20%	20%	20%
Expenditure available to be spent in Lichfield (£m)						
expenditure retained in overall catchment			20.63	25.65	32.37	40.61
Future turnover in Lichfield from catchment (£m) [4]			16.14	18.00	20.07	22.38
Surplus expenditure capacity (£m)			4.49	7.65	12.30	18.23
Turnover of commitments (£m) [5] [4]			5.28	5.89	6.56	7.32
Residual capacity (£m)			-0.79	1.76	5.74	10.91

[1] Bulky goods expenditure = 30.8% of all comparison goods expenditure

[2] Existing bulky goods turnover:	sq.m. net	sales per sq.m.	turnover £m
Lichfield city centre	3,063	£2,500	7.66
Focus DIY	3,634	£1,088	3.95
Magnet	1,114	£1,404	1.56
	7,811	-	13.18

[3] assuming an increase in retention based on potential for clawback of leakage

[4] excluding former Focus DIY and assuming growth in sales densities in bulky goods of 2.2% p.a.

[5] Commitments: (bulky goods only)	sq.m. net	sales per sq.m.	turnover £m
Vulcan Road, Lichfield	3,515	£2,627	9.23
less former Focus DIY			3.95
			5.28

APPENDIX 5: FLOORSPACE CAPACITY

APPENDIX 5A: FLOORSPACE CAPACITY, CONVENIENCE GOODS				
(2001 prices)				
	2011	**2016**	**2021**	**2026**
Lichfield				
residual capacity (£m) [1]	-0.32	0.28	9.14	15.42
turnover/floorspace ratio (£ per sq.m. net) [2]				
upper	11,334	11,678	12,033	12,398
lower	4,121	4,247	4,376	4,508
net floorspace (sq.m.)				
minimum	nil	24	760	1,244
maximum	nil	66	2,089	3,420
gross floorspace (sq.m.) [3]				
minimum	nil	34	1,085	1,777
maximum	nil	94	2,984	4,886
Burntwood				
residual capacity (£m) [1]	1.85	3.81	6.11	9.54
turnover/floorspace ratio (£ per sq.m. net) [2]				
upper	11,334	11,678	12,033	12,398
lower	4,121	4,247	4,376	4,508
net floorspace (sq.m.)				
minimum	163	326	508	769
maximum	449	897	1,396	2,116
gross floorspace (sq.m.) [3]				
minimum	233	466	725	1,099
maximum	641	1,282	1,995	3,023
[1] after allowing for commitments				
[2] assuming increase in sales productivity of 0.6% p.a. from 2006				
[3] assuming a net/gross floorspace ratio of 70%				

APPENDIX 5B: FLOORSPACE CAPACITY, COMPARISON GOODS				
(2001 prices)				
	2011	2016	2021	2026
Lichfield				
residual capacity (£m) [1]	-10.92	-33.61	-9.28	23.39
turnover/floorspace ratio (£ per sq.m. net) [2]				
upper	6,355	7,086	7,900	8,808
lower	4,460	4,972	5,544	6,181
net floorspace (sq.m.)				
minimum	nil	nil	nil	2,655
maximum	nil	nil	nil	3,784
gross floorspace (sq.m.) [3]				
minimum	nil	nil	nil	3,793
maximum	nil	nil	nil	5,406
Burntwood				
residual capacity (£m) [1]	0.02	3.81	9.71	12.70
turnover/floorspace ratio (£ per sq.m. net) [2]				
upper	6,355	7,086	7,900	8,808
lower	4,460	4,972	5,544	6,181
net floorspace (sq.m.)				
minimum	nil	538	1,229	1,442
maximum	nil	766	1,751	2,055
gross floorspace (sq.m.) [3]				
minimum	nil	768	1,756	2,060
maximum	nil	1,095	2,502	2,935
[1] after allowing for commitments				
[2] assuming increase in sales productivity of 2.2% p.a. from 2006				
[3] assuming a net/gross floorspace ratio of 70%				

APPENDIX 5C: FLOORSPACE CAPACITY, BULKY GOODS

(2001 prices)

	2011	2016	2021	2026
Lichfield				
residual capacity (£m) [1]	-0.79	1.76	5.74	10.91
turnover/floorspace ratio (£ per sq.m. net) [2]	2,787	3,108	3,465	3,863
net floorspace (sq.m.)	nil	566	1,657	2,824
gross floorspace (sq.m.) [3]	nil	708	2,071	3,530

[1] after allowing for commitments
[2] assuming increase in sales productivity of 2.2% p.a. from 2006
[3] assuming a net/gross floorspace ratio of 80%

APPENDIX 6A: TOTAL CONVENIENCE GOODS EXPENDITURE

£ million in 2001 prices (excluding Special Forms of Trading)

ASSUMING LOWER EXPENDITURE GROWTH (1.0% p.a. from 2006)

	2006	2011	2016	2021	2026
Burntwood wards					
All Saints	6.38	6.69	7.07	7.51	7.96
Boney Hay	5.50	5.76	6.10	6.48	6.86
Chase Terrace	8.81	9.24	9.77	10.38	10.99
Chasetown	5.78	6.06	6.41	6.80	7.21
Hammerwich	6.27	6.58	6.96	7.39	7.83
Highfield	5.87	6.16	6.51	6.92	7.33
Burntwood Central	5.85	6.13	6.48	6.89	7.29
Summerfield	6.63	6.96	7.36	7.82	8.28
Sub Total	51.08	53.56	56.67	60.18	63.74
Lichfield wards					
Boley Park	8.99	9.89	10.94	12.12	13.28
Chadsmead	5.69	6.25	6.92	7.66	8.40
Curborough	8.44	9.29	10.27	11.38	12.47
Leomansley	7.39	8.13	8.99	9.96	10.91
St Johns	9.00	9.90	10.94	12.12	13.29
Stowe	8.77	9.64	10.66	11.81	12.94
Sub Total	48.28	53.10	58.71	65.04	71.28
Northern Rural wards					
Armitage with Handsacre	8.88	9.29	9.82	10.41	11.02
Colton and Mavesyn Ridware	3.07	4.01	5.05	6.22	7.35
Kings Bromley	2.97	3.06	3.19	3.34	3.49
Longdon	3.42	3.53	3.68	3.85	4.02
Sub Total	18.34	19.90	21.74	23.82	25.88
Eastern Rural wards					
Alrewas and Fradley	8.23	9.29	10.51	11.89	13.24
Mease and Tame	6.09	6.28	6.55	6.85	7.16
Whittington	6.04	6.37	6.78	7.25	7.71
Sub Total	20.36	21.95	23.84	25.98	28.11
Southern Rural wards					
Bourne Vale	3.50	3.62	3.77	3.94	4.12
Fazeley	7.86	8.44	9.12	9.90	10.61
Little Aston	4.93	5.22	5.58	5.98	6.39
Shenstone	5.67	5.99	6.38	6.83	7.28
Stonnall	2.72	2.81	2.92	3.06	3.20
Sub Total	24.68	26.07	27.78	29.71	31.59
Walsall District wards					
Aldridge North and Walsall Wood	21.93	22.93	24.27	25.80	27.35
Brownhills	20.58	21.51	22.77	24.21	25.67
Sub Total	42.51	44.44	47.04	50.00	53.02
Cannock Chase District wards					
Hawks Green	11.00	11.72	12.60	13.57	14.52
Heath Hayes East and Wimblebury	10.01	10.66	11.46	12.34	13.21
Norton Canes	10.87	11.58	12.45	13.41	14.35
Rawnsley	8.32	8.86	9.53	10.26	10.99
Sub Total	40.20	42.82	46.04	49.59	53.08
Study Area Total	**245.46**	**261.84**	**281.83**	**304.32**	**326.70**

APPENDIX 6B: TOTAL COMPARISON GOODS EXPENDITURE

£ million in 2001 prices (excluding Special Forms of Trading)

ASSUMING HIGHER EXPENDITURE GROWTH (5.0% p.a. from 2006)

	2006	2011	2016	2021	2026
Burntwood wards					
All Saints	10.52	12.97	16.71	20.65	25.55
Boney Hay	8.81	10.87	14.00	17.30	21.33
Chase Terrace	14.72	18.16	23.39	28.90	35.64
Chasetown	9.15	11.29	14.54	17.97	22.15
Hammerwich	10.44	12.87	16.58	20.49	25.26
Highfield	10.42	12.86	16.56	20.46	25.23
Burntwood Central	9.64	11.89	15.32	18.93	23.34
Summerfield	10.61	13.08	16.85	20.82	25.67
Sub Total	84.31	103.99	133.96	165.51	204.15
Lichfield wards					
Boley Park	16.03	20.74	27.92	35.98	45.91
Chadsmead	9.14	11.82	15.91	20.50	26.16
Curborough	13.64	17.64	23.76	30.62	39.07
Leomansley	12.56	16.25	21.87	28.19	35.96
St Johns	15.73	20.35	27.39	35.30	45.04
Stowe	14.47	18.71	25.19	32.46	41.42
Sub Total	81.56	105.50	142.04	183.05	233.56
Northern Rural wards					
Armitage with Handsacre	14.88	18.32	23.57	29.09	35.82
Colton and Mavesyn Ridware	5.23	8.02	12.29	17.61	24.23
Kings Bromley	5.15	6.26	7.94	9.66	11.75
Longdon	6.00	7.29	9.24	11.25	13.68
Sub Total	31.25	39.89	53.05	67.60	85.49
Eastern Rural wards					
Alrewas and Fradley	14.28	18.97	26.14	34.38	44.57
Mease and Tame	10.56	12.82	16.27	19.79	24.08
Whittington	10.69	13.26	17.19	21.36	26.47
Sub Total	35.53	45.06	59.59	75.54	95.12
Southern Rural wards					
Bourne Vale	5.90	7.17	9.09	11.06	13.46
Fazeley	12.73	16.07	21.15	26.70	33.33
Little Aston	8.78	10.95	14.24	17.77	22.09
Shenstone	9.89	12.29	15.95	19.84	24.61
Stonnall	4.74	5.76	7.31	8.89	10.82
Sub Total	42.05	52.23	67.74	84.27	104.30
Walsall District wards					
Aldridge North and Walsall Wood	36.05	44.33	57.13	70.65	87.21
Brownhills	32.93	40.50	52.20	64.55	79.68
Sub Total	68.98	84.83	109.33	135.20	166.90
Cannock Chase District wards					
Hawks Green	19.51	24.44	32.00	40.09	49.96
Heath Hayes East and Wimblebury	16.69	20.92	27.38	34.31	42.75
Norton Canes	17.49	21.91	28.68	35.94	44.78
Rawnsley	13.82	17.32	22.67	28.41	35.40
Sub Total	67.51	84.59	110.74	138.75	172.90
Study Area Total	**411.19**	**516.08**	**676.45**	**849.91**	**1,062.41**

APPENDIX 6C: TOTAL COMPARISON GOODS EXPENDITURE

£ million in 2001 prices (excluding Special Forms of Trading)

ASSUMING LOWER GROWTH IN INTERNET SHOPPING

	2006	2011	2016	2021	2026
Burntwood wards					
All Saints	10.52	12.88	15.76	19.25	23.83
Boney Hay	8.81	10.79	13.21	16.13	19.89
Chase Terrace	14.72	18.04	22.07	26.95	33.23
Chasetown	9.15	11.21	13.72	16.75	20.65
Hammerwich	10.44	12.79	15.65	19.11	23.56
Highfield	10.42	12.77	15.62	19.08	23.52
Burntwood Central	9.64	11.81	14.45	17.65	21.76
Summerfield	10.61	12.99	15.90	19.42	23.94
Sub Total	84.31	103.28	126.38	154.33	190.37
Lichfield wards					
Boley Park	16.03	20.60	26.34	33.55	42.81
Chadsmead	9.14	11.74	15.01	19.12	24.39
Curborough	13.64	17.52	22.41	28.55	36.43
Leomansley	12.56	16.14	20.63	26.28	33.53
St Johns	15.73	20.21	25.84	32.91	42.00
Stowe	14.47	18.59	23.77	30.27	38.62
Sub Total	81.56	104.79	134.01	170.69	217.79
Northern Rural wards					
Armitage with Handsacre	14.88	18.20	22.24	27.12	33.40
Colton and Mavesyn Ridware	5.23	7.96	11.60	16.42	22.60
Kings Bromley	5.15	6.22	7.49	9.01	10.96
Longdon	6.00	7.24	8.72	10.49	12.76
Sub Total	31.25	39.62	50.05	63.04	79.72
Eastern Rural wards					
Alrewas and Fradley	14.28	18.85	24.66	32.06	41.56
Mease and Tame	10.56	12.74	15.35	18.46	22.45
Whittington	10.69	13.17	16.22	19.92	24.68
Sub Total	35.53	44.76	56.22	70.44	88.69
Southern Rural wards					
Bourne Vale	5.90	7.12	8.58	10.31	12.55
Fazeley	12.73	15.96	19.96	24.90	31.08
Little Aston	8.78	10.87	13.44	16.57	20.60
Shenstone	9.89	12.21	15.05	18.50	22.95
Stonnall	4.74	5.72	6.89	8.29	10.09
Sub Total	42.05	51.87	63.91	78.58	97.26
Walsall District wards					
Aldridge North and Walsall Wood	36.05	44.03	53.90	65.88	81.33
Brownhills	32.93	40.22	49.24	60.19	74.30
Sub Total	68.98	84.25	103.14	126.07	155.63
Cannock Chase District wards					
Hawks Green	19.51	24.28	30.19	37.39	46.58
Heath Hayes East and Wimblebury	16.69	20.78	25.84	32.00	39.87
Norton Canes	17.49	21.76	27.06	33.51	41.76
Rawnsley	13.82	17.20	21.39	26.49	33.01
Sub Total	67.51	84.02	104.47	129.39	161.22
Study Area Total	**411.19**	**512.59**	**638.18**	**792.53**	**990.68**

APPENDIX 6D: TOTAL COMPARISON GOODS EXPENDITURE

£ million in 2001 prices (excluding Special Forms of Trading)

ASSUMING HIGHER GROWTH IN INTERNET SHOPPING

	2006	2011	2016	2021	2026
Burntwood wards					
All Saints	10.52	12.53	14.07	17.50	21.66
Boney Hay	8.81	10.50	11.79	14.66	18.08
Chase Terrace	14.72	17.55	19.70	24.49	30.21
Chasetown	9.15	10.91	12.24	15.23	18.77
Hammerwich	10.44	12.44	13.97	17.37	21.41
Highfield	10.42	12.42	13.95	17.34	21.38
Burntwood Central	9.64	11.49	12.90	16.04	19.78
Summerfield	10.61	12.64	14.19	17.65	21.76
Sub Total	84.31	100.47	112.81	140.29	173.05
Lichfield wards					
Boley Park	16.03	20.04	23.51	30.50	38.92
Chadsmead	9.14	11.42	13.40	17.38	22.17
Curborough	13.64	17.05	20.01	25.95	33.12
Leomansley	12.56	15.70	18.42	23.89	30.48
St Johns	15.73	19.66	23.07	29.92	38.17
Stowe	14.47	18.08	21.22	27.52	35.11
Sub Total	81.56	101.94	119.62	155.16	197.97
Northern Rural wards					
Armitage with Handsacre	14.88	17.70	19.85	24.65	30.37
Colton and Mavesyn Ridware	5.23	7.75	10.35	14.93	20.54
Kings Bromley	5.15	6.05	6.69	8.19	9.96
Longdon	6.00	7.04	7.78	9.53	11.60
Sub Total	31.25	38.54	44.68	57.30	72.46
Eastern Rural wards					
Alrewas and Fradley	14.28	18.33	22.01	29.14	37.78
Mease and Tame	10.56	12.39	13.70	16.78	20.41
Whittington	10.69	12.82	14.47	18.11	22.43
Sub Total	35.53	43.54	50.19	64.03	80.62
Southern Rural wards					
Bourne Vale	5.90	6.92	7.66	9.37	11.41
Fazeley	12.73	15.52	17.81	22.63	28.25
Little Aston	8.78	10.58	11.99	15.06	18.72
Shenstone	9.89	11.88	13.43	16.82	20.86
Stonnall	4.74	5.56	6.15	7.54	9.17
Sub Total	42.05	50.46	57.05	71.43	88.41
Walsall District wards					
Aldridge North and Walsall Wood	36.05	42.83	48.11	59.89	73.93
Brownhills	32.93	39.13	43.96	54.71	67.54
Sub Total	68.98	81.96	92.07	114.60	141.47
Cannock Chase District wards					
Hawks Green	19.51	23.62	26.95	33.98	42.35
Heath Hayes East and Wimblebury	16.69	20.21	23.06	29.08	36.24
Norton Canes	17.49	21.17	24.15	30.46	37.96
Rawnsley	13.82	16.74	19.10	24.08	30.01
Sub Total	67.51	81.73	93.26	117.61	146.55
Study Area Total	**411.19**	**498.63**	**569.67**	**720.41**	**900.53**

APPENDIX 7A: CAPACITY ANALYSIS, CONVENIENCE GOODS

Lichfield Catchment Area (2001 prices)

Higher Retention Level, Lichfield

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Lichfield wards	44.40	48.28	53.91	61.09	69.33	77.90
Secondary catchment						
Burntwood wards	46.97	51.08	54.38	58.97	64.16	69.66
Northern Rural wards	16.86	18.34	20.20	22.62	25.39	28.28
Eastern Rural wards	18.72	20.36	22.28	24.81	27.70	30.72
Southern Rural wards	22.70	24.68	26.47	28.91	31.67	24.53
Secondary catchment total	105.25	114.46	123.33	135.31	148.92	153.19
Total expenditure from catchment (£m)	149.65	162.74	177.24	196.40	218.25	231.09
Turnover in Lichfield (£m) [1]						
from primary catchment	37.21	42.07				
from secondary catchment	27.77	31.40				
total turnover from catchment area	64.98	73.47				
inflow (additional 5% of turnover)	3.25	3.67				
total turnover in Lichfield	68.23	77.14				
Retention levels [2]	existing		forecasts			
primary catchment	84%	87%	90%	95%	95%	95%
secondary catchment	26%	27%	30%	30%	30%	30%
overall retention	43%	45%	48%	50%	51%	52%
Expenditure available to be spent in Lichfield (£m)						
from primary catchment			48.52	58.04	65.86	74.01
from secondary catchment			37.00	40.59	44.68	45.96
total expenditure available			85.52	98.63	110.54	119.96
Future turnover in Lichfield from catchment (£m) [3]			75.70	78.00	80.37	82.81
Surplus expenditure capacity (£m)			9.82	20.63	30.17	37.16
Turnover of commitments (£m) [4] [3]			8.89	18.76	19.33	19.92
Residual capacity (£m)			0.93	1.87	10.84	17.24

[1] Survey-based turnover 2004 from Retail Study increased to 2006
allowing for the development of the new Waitrose supermarket at Walsall Road, Lichfield

Waitrose convenience goods turnover	£17.81m	
turnover additional to the catchment (50%)	£8.91m	

trade draw from primary and secondary catchments the same as in 2004
[2] assuming an increase in retention based on potential for clawback of leakage
[3] assuming growth in sales densities in convenience goods of 0.6% p.a. (Experian forecast)

[4] Commitments:	sq.m. net	sales	turnover	
(convenience goods only)		per sq.m.	£m	
Morrisons extension, Burntwood	267	£9,360	2.50	
replacement Tesco store, Lichfield	1,289	-	4.61	(additional turnover)
Lidl, Eastern Avenue, Lichfield	630	£2,830	1.78	
Friarsgate, Lichfield	1,000	£9,600	9.60	(after 2011)
total			18.49	

APPENDIX 7B: CAPACITY ANALYSIS, CONVENIENCE GOODS

Lichfield Catchment Area (2001 prices)

Lower Expenditure Growth, Lichfield (1.0% pa from 2006)

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Lichfield wards	44.40	48.28	53.10	58.71	65.04	71.28
Secondary catchment						
Burntwood wards	46.97	51.08	53.56	56.67	60.18	63.74
Northern Rural wards	16.86	18.34	19.90	21.74	23.82	25.88
Eastern Rural wards	18.72	20.36	21.95	23.84	25.98	28.11
Southern Rural wards	22.70	24.68	26.07	27.78	29.71	31.59
Secondary catchment total	105.25	114.46	121.48	130.03	139.69	149.32
Total expenditure from catchment (£m)	149.65	162.74	174.58	188.74	204.73	220.60
Turnover in Lichfield (£m) [1]						
from primary catchment	37.21	42.07				
from secondary catchment	27.77	31.40				
total turnover from catchment area	64.98	73.47				
inflow (additional 5% of turnover)	3.25	3.67				
total turnover in Lichfield	68.23	77.14				
Retention levels [2]	existing			forecasts		
primary catchment	84%	87%	90%	94%	94%	94%
secondary catchment	26%	27%	30%	30%	30%	30%
overall retention	43%	45%	48%	50%	50%	51%
Expenditure available to be spent in Lichfield (£m)						
from primary catchment			47.79	55.19	61.14	67.00
from secondary catchment			36.44	39.01	41.91	44.80
total expenditure available			84.23	94.20	103.04	111.80
Future turnover in Lichfield from catchment (£m) [3]			75.70	78.00	80.37	82.81
Surplus expenditure capacity (£m)			8.54	16.20	22.68	28.99
Turnover of commitments (£m) [4] [3]			10.01	19.74	20.34	20.96
Residual capacity (£m)			-1.47	-3.54	2.34	8.03
[1] Survey-based turnover 2004 from Retail Study increased to 2006						
allowing for the development of the new Waitrose supermarket at Walsall Road, Lichfield						
Waitrose convenience goods turnover	£17.81m					
turnover additional to the catchment (50%)	£8.91m					
trade draw from primary and secondary catchments the same as in 2004						
[2] assuming an increase in retention based on potential for clawback of leakage						
[3] assuming growth in sales densities in convenience goods of 0.6% p.a. (Experian forecast)						
[4] Commitments:	sq.m. net	sales	turnover			
(convenience goods only)		per sq.m.	£m			
Morrisons extension, Burntwood	267	£9,360	2.50			
replacement Tesco store, Lichfield	1,289	-	4.61	(additional turnover)		
Lidl, Eastern Avenue, Lichfield	630	£2,830	1.78			
Friarsgate, Lichfield	1,000	£9,600	9.60	(after 2011)		
Local centre, Fradley	250	£5,000	1.25			
total			19.74			

APPENDIX 7C: CAPACITY ANALYSIS, CONVENIENCE GOODS

Burntwood Catchment Area (2001 prices)

Higher Retention Level, Burntwood

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Burntwood wards	46.97	51.08	54.38	58.97	64.16	69.66
Secondary catchment						
Walsall District wards	40.49	42.51	45.12	48.95	53.31	57.95
Cannock Chase District wards	37.75	40.20	43.47	47.91	52.86	58.01
Secondary catchment total	78.24	82.71	88.59	96.86	106.17	115.96
Total expenditure from catchment (£m)	125.21	133.79	142.97	155.83	170.33	185.62
Turnover in Burntwood (£m) [1]						
from primary catchment	23.44	25.49				
from secondary catchment	3.44	3.61				
total turnover from catchment area	26.88	29.10				
inflow (additional 5% of turnover)	1.34	1.46				
total turnover in Burntwood	28.22	30.56				
Retention levels [2]	existing			forecasts		
primary catchment	50%	50%	55%	70%	70%	70%
secondary catchment	4%	4%	5%	5%	5%	5%
overall retention	21%	22%	24%	30%	29%	29%
Expenditure available to be spent in Burntwood (£m)						
from primary catchment			29.91	41.28	44.91	48.76
from secondary catchment			4.43	4.84	5.31	5.80
total expenditure available			34.34	46.12	50.22	54.56
Future turnover in Burntwood from catchment (£m) [3]			29.98	30.89	31.83	31.83
Surplus expenditure capacity (£m)			4.35	15.23	18.39	22.73
Turnover of commitments (£m) [4] [3]			2.50	2.58	2.65	2.73
Residual capacity (£m)			1.85	12.65	15.73	19.99

[1] Survey-based turnover 2004 from Retail Study increased to 2006 in line with expenditure growth in catchment area

[2] assuming an increase in retention based on potential for clawback of leakage

[3] assuming growth in sales densities in convenience goods of 0.6% p.a. (Experian forecasts)

[4] Commitments:	sq.m. net	sales	turnover
(convenience goods only)		per sq.m.	£m
Morrisons extension, Burntwood	267	£9,360	2.50

APPENDIX 7D: CAPACITY ANALYSIS, CONVENIENCE GOODS						
Burntwood Catchment Area (2001 prices)						
Lower Expenditure Growth, Burntwood (1.0% pa from 2006)						
	2004	**2006**	**2011**	**2016**	**2021**	**2026**
Residents' expenditure in catchment area (£m)						
Primary catchment						
Burntwood wards	46.97	51.08	53.56	56.67	60.18	63.74
Secondary catchment						
Walsall District wards	40.49	42.51	44.44	47.04	50.00	53.02
Cannock Chase District wards	37.75	40.20	42.82	46.04	49.59	53.08
Secondary catchment total	78.24	82.71	87.26	93.08	99.59	106.10
Total expenditure from catchment (£m)	125.21	133.79	140.82	149.75	159.77	169.84
Turnover in Burntwood (£m) [1]						
from primary catchment	23.44	25.49				
from secondary catchment	3.44	3.61				
total turnover from catchment area	26.88	29.10				
inflow (additional 5% of turnover)	1.34	1.46				
total turnover in Burntwood	28.22	30.56				
Retention levels [2]	existing			forecasts		
primary catchment	50%	50%	55%	55%	55%	55%
secondary catchment	4%	4%	5%	5%	5%	5%
overall retention	21%	22%	24%	24%	24%	24%
Expenditure available to be spent in Burntwood (£m)						
from primary catchment			29.46	31.17	33.10	35.06
from secondary catchment			4.36	4.65	4.98	5.31
total expenditure available			33.82	35.82	38.08	40.36
Future turnover in Burntwood from catchment (£m) [3]			29.98	30.89	31.83	31.83
Surplus expenditure capacity (£m)			3.84	4.93	6.25	8.53
Turnover of commitments (£m) [4] [3]			2.50	2.58	2.65	2.73
Residual capacity (£m)			1.34	2.35	3.59	5.79
[1] Survey-based turnover 2004 from Retail Study increased to 2006						
in line with expenditure growth in catchment area						
[2] assuming an increase in retention based on potential for clawback of leakage						
[3] assuming growth in sales densities in convenience goods of 0.6% p.a. (Experian forecasts)						
[4] Commitments:	sq.m. net	sales	turnover			
(convenience goods only)		per sq.m.	£m			
Morrisons extension, Burntwood	267	£9,360	2.50			

APPENDIX 8A: CAPACITY ANALYSIS, COMPARISON GOODS

Lichfield Catchment Area (2001 prices)

Higher Expenditure Growth, Lichfield (5.0% pa from 2006)

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Lichfield wards	74.25	81.56	105.50	142.04	183.05	233.56
Secondary catchment						
Burntwood wards	76.75	84.31	103.99	133.96	165.51	204.15
Northern Rural wards	28.45	31.25	39.89	53.05	67.60	85.49
Eastern Rural wards	32.35	35.53	45.06	59.59	75.54	95.12
Southern Rural wards	38.28	42.05	52.23	67.74	84.27	104.30
Secondary catchment total	175.83	193.14	241.17	314.34	392.92	489.06
Total expenditure from catchment (£m)	250.08	274.70	346.67	456.38	575.97	722.62
Turnover in Lichfield (£m) [1]						
from primary catchment	33.26	36.54				
from secondary catchment	39.70	43.61				
total turnover from catchment area	72.96	80.14				
inflow (additional 15% of turnover)	10.94	12.02				
total turnover in Lichfield	83.90	92.16				
Retention levels [2]	existing			forecasts		
primary catchment	45%	45%	60%	65%	65%	65%
secondary catchment	23%	23%	30%	35%	35%	35%
overall retention	29%	29%	39%	44%	45%	45%
Expenditure available to be spent in Lichfield (£m)						
from primary catchment			63.30	92.33	118.98	151.81
from secondary catchment			72.35	110.02	137.52	171.17
total expenditure available			135.65	202.35	256.50	322.99
Future turnover in Lichfield from catchment (£m) [3]			89.35	99.63	111.08	123.85
Surplus expenditure capacity (£m)			46.30	102.72	145.43	199.14
Turnover of commitments (£m) [4] [3]			52.63	118.60	132.23	147.43
Residual capacity (£m)			-6.33	-15.88	13.19	51.71

[1] Survey-based turnover 2004 from Retail Study increased to 2006 in line with expenditure growth in catchment area

[2] assuming an increase in retention based on potential for clawback of leakage

[3] assuming growth in sales densities in comparison goods of 2.2% p.a. (Experian forecasts)

[4] Commitments: (comparison goods only)	sq.m. net	sales per sq.m.	turnover £m	
Friarsgate, Lichfield	14,586	£4,108	59.92	(after 2011)
replacement Tesco store, Lichfield	2,460	-	13.08	(additional turnover)
Vulcan Road, Lichfield	3,013	£2,627	7.92	
Morrisons extension, Burntwood	534	£5,879	3.14	
Local centre, Fradley	500	£4,000	2.00	
LCP scheme, Burntwood	6,584	£4,025	26.50	
Total	27,677	-	112.55	

APPENDIX 8B: CAPACITY ANALYSIS, COMPARISON GOODS

Lichfield Catchment Area (2001 prices)

Higher Retention Level, Lichfield

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Lichfield wards	74.25	81.56	101.94	129.60	167.02	213.10
Secondary catchment						
Burntwood wards	76.75	84.31	100.47	122.22	151.01	186.18
Northern Rural wards	28.45	31.25	38.54	48.40	61.68	78.00
Eastern Rural wards	32.35	35.53	43.54	54.37	68.92	86.79
Southern Rural wards	38.28	42.05	50.46	61.81	76.88	95.17
Secondary catchment total	175.83	193.14	233.01	286.80	358.49	446.14
Total expenditure from catchment (£m)	250.08	274.70	334.95	416.40	525.51	659.24
Turnover in Lichfield (£m) [1]						
from primary catchment	33.26	36.54				
from secondary catchment	39.70	43.61				
total turnover from catchment area	72.96	80.14				
inflow (additional 15% of turnover)	10.94	12.02				
total turnover in Lichfield	83.90	92.16				
Retention levels [2]	existing		forecasts			
primary catchment	45%	45%	60%	70%	70%	70%
secondary catchment	23%	23%	30%	35%	35%	35%
overall retention	29%	29%	39%	46%	46%	46%
Expenditure available to be spent in Lichfield (£m)						
from primary catchment			61.16	90.72	116.91	149.17
from secondary catchment			69.90	100.38	125.47	156.15
total expenditure available			131.07	191.10	242.39	305.32
Future turnover in Lichfield from catchment (£m) [3]			89.35	99.63	111.08	123.85
Surplus expenditure capacity (£m)			41.71	91.47	131.31	181.47
Turnover of commitments (£m) [4] [3]			52.63	118.60	132.23	147.43
Residual capacity (£m)			-10.92	-27.13	-0.92	34.04

[1] Survey-based turnover 2004 from Retail Study increased to 2006
in line with expenditure growth in catchment area
[2] assuming an increase in retention based on potential for clawback of leakage
[3] assuming growth in sales densities in comparison goods of 2.2% p.a. (Experian forecasts)

[4] Commitments:	sq.m. net	sales	turnover	
(comparison goods only)		per sq.m.	£m	
Friarsgate, Lichfield	14,586	£4,108	59.92	(after 2011)
replacement Tesco store, Lichfield	2,460	-	13.08	(additional turnover)
Vulcan Road, Lichfield	3,013	£2,627	7.92	
Morrisons extension, Burntwood	534	£5,879	3.14	
Local centre, Fradley	500	£4,000	2.00	
LCP scheme, Burntwood	6,584	£4,025	26.50	
Total	27,677	-	112.55	

APPENDIX 8C: CAPACITY ANALYSIS, COMPARISON GOODS

Lichfield Catchment Area (2001 prices)

Higher Growth in Sales Productivity, Lichfield

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Lichfield wards	74.25	81.56	101.94	129.60	167.02	213.10
Secondary catchment						
Burntwood wards	76.75	84.31	100.47	122.22	151.01	186.18
Northern Rural wards	28.45	31.25	38.54	48.40	61.68	78.00
Eastern Rural wards	32.35	35.53	43.54	54.37	68.92	86.79
Southern Rural wards	38.28	42.05	50.46	61.81	76.88	95.17
Secondary catchment total	175.83	193.14	233.01	286.80	358.49	446.14
Total expenditure from catchment (£m)	250.08	274.70	334.95	416.40	525.51	659.24
Turnover in Lichfield (£m) [1]						
from primary catchment	33.26	36.54				
from secondary catchment	39.70	43.61				
total turnover from catchment area	72.96	80.14				
inflow (additional 15% of turnover)	10.94	12.02				
total turnover in Lichfield	83.90	92.16				
Retention levels [2]	existing		forecasts			
primary catchment	45%	45%	60%	65%	65%	65%
secondary catchment	23%	23%	30%	35%	35%	35%
overall retention	29%	29%	39%	44%	45%	45%
Expenditure available to be spent in Lichfield (£m)						
from primary catchment			61.16	84.24	108.56	138.52
from secondary catchment			69.90	100.38	125.47	156.15
total expenditure available			131.07	184.62	234.03	294.66
Future turnover in Lichfield from catchment (£m) [3]			92.01	105.63	121.27	139.23
Surplus expenditure capacity (£m)			39.06	78.99	112.76	155.44
Turnover of commitments (£m) [4] [3]			52.63	120.34	136.16	156.32
Residual capacity (£m)			-13.57	-41.35	-23.40	-0.88

[1] Survey-based turnover 2004 from Retail Study increased to 2006 in line with expenditure growth in catchment area

[2] assuming an increase in retention based on potential for clawback of leakage

[3] assuming growth in sales densities in comparison goods of 2.8% p.a. (Experian higher forecasts)

[4] Commitments:	sq.m. net	sales	turnover	
(comparison goods only)		per sq.m.	£m	
Friarsgate, Lichfield	14,586	£4,108	59.92	(after 2011)
replacement Tesco store, Lichfield	2,460	-	13.08	(additional turnover)
Vulcan Road, Lichfield	3,013	£2,627	7.92	
Morrisons extension, Burntwood	534	£5,879	3.14	
Local centre, Fradley	500	£4,000	2.00	
LCP scheme, Burntwood	6,584	£4,025	26.50	
Total	27,677	-	112.55	

APPENDIX 8D: CAPACITY ANALYSIS, COMPARISON GOODS

Lichfield Catchment Area (2001 prices)

Lower Growth in Internet Shopping, Lichfield

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Lichfield wards	74.25	81.56	104.79	134.01	170.69	217.79
Secondary catchment						
Burntwood wards	76.75	84.31	103.28	126.38	154.33	190.37
Northern Rural wards	28.45	31.25	39.62	50.05	63.04	79.72
Eastern Rural wards	32.35	35.53	44.76	56.22	70.44	88.69
Southern Rural wards	38.28	42.05	51.87	63.91	78.58	97.26
Secondary catchment total	175.83	193.14	239.53	296.56	366.39	456.04
Total expenditure from catchment (£m)	250.08	274.70	344.32	430.57	537.08	673.83
Turnover in Lichfield (£m) [1]						
from primary catchment	33.26	36.54				
from secondary catchment	39.70	43.61				
total turnover from catchment area	72.96	80.14				
inflow (additional 15% of turnover)	10.94	12.02				
total turnover in Lichfield	83.90	92.16				
Retention levels [2]	existing			forecasts		
primary catchment	45%	45%	60%	65%	65%	65%
secondary catchment	23%	23%	30%	35%	35%	35%
overall retention	29%	29%	39%	44%	45%	45%
Expenditure available to be spent in Lichfield (£m)						
from primary catchment			62.87	87.11	110.95	141.56
from secondary catchment			71.86	103.80	128.24	159.61
total expenditure available			134.73	190.90	239.19	301.18
Future turnover in Lichfield from catchment (£m) [3]			89.35	99.63	111.08	123.85
Surplus expenditure capacity (£m)			45.38	91.28	128.11	177.33
Turnover of commitments (£m) [4] [3]			52.63	118.60	132.23	147.43
Residual capacity (£m)			-7.25	-27.32	-4.13	29.90
[1] Survey-based turnover 2004 from Retail Study increased to 2006						
in line with expenditure growth in catchment area						
[2] assuming an increase in retention based on potential for clawback of leakage						
[3] assuming growth in sales densities in comparison goods of 2.2% p.a. (Experian forecasts)						
[4] Commitments:	sq.m. net	sales	turnover			
(comparison goods only)		per sq.m.	£m			
Friarsgate, Lichfield	14,586	£4,108	59.92	(after 2011)		
replacement Tesco store, Lichfield	2,460	-	13.08	(additional turnover)		
Vulcan Road, Lichfield	3,013	£2,627	7.92			
Morrisons extension, Burntwood	534	£5,879	3.14			
Local centre, Fradley	500	£4,000	2.00			
LCP scheme, Burntwood	6,584	£4,025	26.50			
Total	27,677	-	112.55			

APPENDIX 8E: CAPACITY ANALYSIS, COMPARISON GOODS

Lichfield Catchment Area (2001 prices)

Higher Growth in Internet Shopping, Lichfield

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Lichfield wards	74.25	81.56	101.94	119.62	155.16	197.97
Secondary catchment						
Burntwood wards	76.75	84.31	100.47	112.81	140.29	173.05
Northern Rural wards	28.45	31.25	38.54	44.68	57.30	72.46
Eastern Rural wards	32.35	35.53	43.54	50.19	64.03	80.62
Southern Rural wards	38.28	42.05	50.46	57.05	71.43	88.41
Secondary catchment total	175.83	193.14	233.01	264.73	333.05	414.54
Total expenditure from catchment (£m)	250.08	274.70	334.95	384.35	488.21	612.51
Turnover in Lichfield (£m) [1]						
from primary catchment	33.26	36.54				
from secondary catchment	39.70	43.61				
total turnover from catchment area	72.96	80.14				
inflow (additional 15% of turnover)	10.94	12.02				
total turnover in Lichfield	83.90	92.16				
Retention levels [2]	existing			forecasts		
primary catchment	45%	45%	60%	65%	65%	65%
secondary catchment	23%	23%	30%	35%	35%	35%
overall retention	29%	29%	39%	44%	45%	45%
Expenditure available to be spent in Lichfield (£m)						
from primary catchment			61.16	77.75	100.85	128.68
from secondary catchment			69.90	92.66	116.57	145.09
total expenditure available			131.07	170.41	217.42	273.77
Future turnover in Lichfield from catchment (£m) [3]			89.35	99.63	111.08	123.85
Surplus expenditure capacity (£m)			41.71	70.78	106.34	149.92
Turnover of commitments (£m) [4] [3]			52.63	118.60	132.23	147.43
Residual capacity (£m)			-10.92	-47.82	-25.89	2.49

[1] Survey-based turnover 2004 from Retail Study increased to 2006 in line with expenditure growth in catchment area

[2] assuming an increase in retention based on potential for clawback of leakage

[3] assuming growth in sales densities in comparison goods of 2.2% p.a. (Experian forecasts)

[4] Commitments:	sq.m. net	sales	turnover	
(comparison goods only)		per sq.m.	£m	
Friarsgate, Lichfield	14,586	£4,108	59.92	(after 2011)
replacement Tesco store, Lichfield	2,460	-	13.08	(additional turnover)
Vulcan Road, Lichfield	3,013	£2,627	7.92	
Morrisons extension, Burntwood	534	£5,879	3.14	
Local centre, Fradley	500	£4,000	2.00	
LCP scheme, Burntwood	6,584	£4,025	26.50	
Total	27,677	-	112.55	

APPENDIX 8F: CAPACITY ANALYSIS, COMPARISON GOODS

Burntwood Catchment Area (2001 prices)

Higher Expenditure Growth, Burntwood (5.0% pa from 2006)

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Burntwood wards	76.75	84.31	103.99	133.96	165.51	204.15
Secondary catchment						
Walsall District wards	65.04	68.98	84.83	109.33	135.20	166.90
Cannock Chase District wards	62.76	67.51	84.59	110.74	138.75	172.90
Secondary catchment total	127.80	136.49	169.42	220.07	273.95	339.80
Total expenditure from catchment (£m)	204.55	220.80	273.41	354.03	439.46	543.95
Turnover in Burntwood (£m) [1]						
from primary catchment	3.58	3.98				
from secondary catchment	2.18	2.33				
total turnover from catchment area	5.76	6.31				
inflow (additional 5% of turnover)	0.29	0.32				
total turnover in Burntwood	6.05	6.63				
Retention levels [2]	existing			forecasts		
primary catchment	5%	5%	30%	30%	30%	30%
secondary catchment	2%	2%	4%	4%	4%	4%
overall retention	3%	3%	14%	14%	14%	14%
Expenditure available to be spent in Burntwood (£m)						
from primary catchment			31.20	40.19	49.65	61.25
from secondary catchment			6.78	8.80	10.96	13.59
total expenditure available			37.97	48.99	60.61	74.84
Future turnover in Burntwood from catchment (£m) [3]			7.03	7.84	8.74	9.75
Surplus expenditure capacity (£m)			30.94	41.15	51.87	65.09
Turnover of commitments (£m) [4] [3]			29.64	33.05	36.85	45.80
Residual capacity (£m)			1.30	8.10	15.02	19.29

[1] Survey-based turnover 2004 from Retail Study increased to 2006 in line with expenditure growth in catchment area

[2] assuming an increase in retention based on potential for clawback of leakage

[3] assuming growth in sales densities in comparison goods of 2.2% p.a. (Experian forecasts)

[4] Commitments:	sq.m. net	sales	turnover
(comparison goods only)		per sq.m.	£m
Morrisons extension, Burntwood	534	£5,879	3.14
LCP scheme, Burntwood	6,584	£4,025	26.50
	7,118	-	29.64

APPENDIX 8G: CAPACITY ANALYSIS, COMPARISON GOODS						
Burntwood Catchment Area (2001 prices)						
Higher Retention Level, Burntwood						
	2004	**2006**	**2011**	**2016**	**2021**	**2026**
Residents' expenditure in catchment area (£m)						
Primary catchment						
Burntwood wards	76.75	84.31	100.47	122.22	151.01	186.18
Secondary catchment						
Walsall District wards	65.04	68.98	81.96	99.75	123.36	152.28
Cannock Chase District wards	62.76	67.51	81.73	101.04	126.60	157.75
Secondary catchment total	127.80	136.49	163.69	200.79	249.96	310.03
Total expenditure from catchment (£m)	204.55	220.80	264.16	323.01	400.97	496.21
Turnover in Burntwood (£m) [1]						
from primary catchment	3.58	3.98				
from secondary catchment	2.18	2.33				
total turnover from catchment area	5.76	6.31				
inflow (additional 5% of turnover)	0.29	0.32				
total turnover in Burntwood	6.05	6.63				
Retention levels [2]	existing		forecasts			
primary catchment	5%	5%	35%	35%	35%	35%
secondary catchment	2%	2%	4%	4%	4%	4%
overall retention	3%	3%	16%	16%	16%	16%
Expenditure available to be spent in Burntwood (£m)						
from primary catchment			35.16	42.78	52.85	65.16
from secondary catchment			6.55	8.03	10.00	12.40
total expenditure available			41.71	50.81	62.85	77.56
Future turnover in Burntwood from catchment (£m) [3]			7.03	7.84	8.74	9.75
Surplus expenditure capacity (£m)			34.68	42.97	54.11	67.82
Turnover of commitments (£m) [4] [3]			29.64	33.05	36.85	45.80
Residual capacity (£m)			5.04	9.92	17.26	22.01
[1] Survey-based turnover 2004 from Retail Study increased to 2006						
in line with expenditure growth in catchment area						
[2] assuming an increase in retention based on potential for clawback of leakage						
[3] assuming growth in sales densities in comparison goods of 2.2% p.a. (Experian forecasts)						
[4] Commitments:	sq.m. net	sales	turnover			
(comparison goods only)		per sq.m.	£m			
Morrisons extension, Burntwood	534	£5,879	3.14			
LCP scheme, Burntwood	6,584	£4,025	26.50			
	7,118	-	29.64			

APPENDIX 8H: CAPACITY ANALYSIS, COMPARISON GOODS						
Burntwood Catchment Area (2001 prices)						
Higher Growth in Sales Productivity, Burntwood						
	2004	**2006**	**2011**	**2016**	**2021**	**2026**
Residents' expenditure in catchment area (£m)						
Primary catchment						
Burntwood wards	76.75	84.31	100.47	122.22	151.01	186.18
Secondary catchment						
Walsall District wards	65.04	68.98	81.96	99.75	123.36	152.28
Cannock Chase District wards	62.76	67.51	81.73	101.04	126.60	157.75
Secondary catchment total	127.80	136.49	163.69	200.79	249.96	310.03
Total expenditure from catchment (£m)	204.55	220.80	264.16	323.01	400.97	496.21
Turnover in Burntwood (£m) [1]						
from primary catchment	3.58	3.98				
from secondary catchment	2.18	2.33				
total turnover from catchment area	5.76	6.31				
inflow (additional 5% of turnover)	0.29	0.32				
total turnover in Burntwood	6.05	6.63				
Retention levels [2]	existing		forecasts			
primary catchment	5%	5%	30%	30%	30%	30%
secondary catchment	2%	2%	4%	4%	4%	4%
overall retention	3%	3%	14%	14%	14%	14%
Expenditure available to be spent in Burntwood (£m)						
from primary catchment			30.14	36.67	45.30	55.85
from secondary catchment			6.55	8.03	10.00	12.40
total expenditure available			36.69	44.70	55.30	68.26
Future turnover in Burntwood from catchment (£m) [3]			7.24	8.31	9.55	10.96
Surplus expenditure capacity (£m)			29.45	36.38	45.76	57.30
Turnover of commitments (£m) [4] [3]			29.64	34.03	39.07	51.49
Residual capacity (£m)			-0.19	2.35	6.69	5.80
[1] Survey-based turnover 2004 from Retail Study increased to 2006						
in line with expenditure growth in catchment area						
[2] assuming an increase in retention based on potential for clawback of leakage						
[3] assuming growth in sales densities in comparison goods of 2.8% p.a. (Experian higher forecasts)						
[4] Commitments:	sq.m. net	sales	turnover			
(comparison goods only)		per sq.m.	£m			
Morrisons extension, Burntwood	534	£5,879	3.14			
LCP scheme, Burntwood	6,584	£4,025	26.50			
	7,118	-	29.64			

APPENDIX 8J: CAPACITY ANALYSIS, COMPARISON GOODS						
Burntwood Catchment Area (2001 prices)						
Lower Growth in Internet Shopping, Burntwood						
	2004	**2006**	**2011**	**2016**	**2021**	**2026**
Residents' expenditure in catchment area (£m)						
Primary catchment						
Burntwood wards	76.75	84.31	103.28	126.38	154.33	190.37
Secondary catchment						
Walsall District wards	65.04	68.98	84.25	103.14	126.07	155.63
Cannock Chase District wards	62.76	67.51	84.02	104.47	129.39	161.22
Secondary catchment total	127.80	136.49	168.27	207.61	255.46	316.85
Total expenditure from catchment (£m)	204.55	220.80	271.55	333.99	409.79	507.22
Turnover in Burntwood (£m) [1]						
from primary catchment	3.58	3.98				
from secondary catchment	2.18	2.33				
total turnover from catchment area	5.76	6.31				
inflow (additional 5% of turnover)	0.29	0.32				
total turnover in Burntwood	6.05	6.63				
Retention levels [2]	existing			forecasts		
primary catchment	5%	5%	30%	30%	30%	30%
secondary catchment	2%	2%	4%	4%	4%	4%
overall retention	3%	3%	14%	14%	14%	14%
Expenditure available to be spent in Burntwood (£m)						
from primary catchment			30.98	37.91	46.30	57.11
from secondary catchment			6.73	8.30	10.22	12.67
total expenditure available			37.71	46.22	56.52	69.79
Future turnover in Burntwood from catchment (£m) [3]			7.03	7.84	8.74	9.75
Surplus expenditure capacity (£m)			30.68	38.38	47.77	60.04
Turnover of commitments (£m) [4] [3]			29.64	33.05	36.85	45.80
Residual capacity (£m)			1.04	5.33	10.93	14.23
[1] Survey-based turnover 2004 from Retail Study increased to 2006						
in line with expenditure growth in catchment area						
[2] assuming an increase in retention based on potential for clawback of leakage						
[3] assuming growth in sales densities in comparison goods of 2.2% p.a. (Experian forecasts)						
[4] Commitments:	sq.m. net	sales	turnover			
(comparison goods only)		per sq.m.	£m			
Morrisons extension, Burntwood	534	£5,879	3.14			
LCP scheme, Burntwood	6,584	£4,025	26.50			
	7,118	-	29.64			

APPENDIX 8K: CAPACITY ANALYSIS, COMPARISON GOODS

Burntwood Catchment Area (2001 prices)

Higher Growth in Internet Shopping, Burntwood

	2004	2006	2011	2016	2021	2026
Residents' expenditure in catchment area (£m)						
Primary catchment						
Burntwood wards	76.75	84.31	100.47	112.81	140.29	173.05
Secondary catchment						
Walsall District wards	65.04	68.98	81.96	92.07	114.60	141.47
Cannock Chase District wards	62.76	67.51	81.73	93.26	117.61	146.55
Secondary catchment total	127.80	136.49	163.69	185.33	232.21	288.02
Total expenditure from catchment (£m)	204.55	220.80	264.16	298.14	372.50	461.07
Turnover in Burntwood (£m) [1]						
from primary catchment	3.58	3.98				
from secondary catchment	2.18	2.33				
total turnover from catchment area	5.76	6.31				
inflow (additional 5% of turnover)	0.29	0.32				
total turnover in Burntwood	6.05	6.63				
Retention levels [2]	existing			forecasts		
primary catchment	5%	5%	30%	30%	30%	30%
secondary catchment	2%	2%	4%	4%	4%	4%
overall retention	3%	3%	14%	14%	14%	14%
Expenditure available to be spent in Burntwood (£m)						
from primary catchment			30.14	33.84	42.09	51.92
from secondary catchment			6.55	7.41	9.29	11.52
total expenditure available			36.69	41.26	51.38	63.44
Future turnover in Burntwood from catchment (£m) [3]			7.03	7.84	8.74	9.75
Surplus expenditure capacity (£m)			29.66	33.41	42.63	53.69
Turnover of commitments (£m) [4] [3]			29.64	33.05	36.85	45.80
Residual capacity (£m)			0.02	0.37	5.79	7.88
[1] Survey-based turnover 2004 from Retail Study increased to 2006						
in line with expenditure growth in catchment area						
[2] assuming an increase in retention based on potential for clawback of leakage						
[3] assuming growth in sales densities in comparison goods of 2.2% p.a. (Experian forecasts)						
[4] Commitments:	sq.m. net	sales	turnover			
(comparison goods only)		per sq.m.	£m			
Morrisons extension, Burntwood	534	£5,879	3.14			
LCP scheme, Burntwood	6,584	£4,025	26.50			
	7,118	-	29.64			

APPENDIX 9: SENSITIVITY OF CAPACITY ANALYSIS - SUMMARY TABLES

APPENDIX 9A: SENSITIVITY OF CAPACITY ANALYSIS, CONVENIENCE GOODS (£ million in 2001 prices)					
Appendix Ref					
	Lichfield	**2011**	**2016**	**2021**	**2026**
4A	capacity - main scenario [1]	-0.32	0.28	9.14	15.42
7A	capacity with higher retention level [2]	0.93	1.87	10.84	17.24
7B	capacity with lower expenditure growth [3]	-1.47	-3.54	2.34	8.03
	[1] residual capacity after allowing for commitments				
	[2] retention level of 95% in Lichfield primary catchment area from 2016				
	[3] based on expenditure growth of 1.0% p.a.				
	Burntwood	**2011**	**2016**	**2021**	**2026**
4B	capacity - main scenario [1]	1.85	3.81	6.11	9.54
7C	capacity with higher retention level [2]	1.85	12.65	15.73	19.99
7D	capacity with lower expenditure growth [3]	1.34	2.35	3.59	5.79
	[1] residual capacity after allowing for commitments				
	[2] retention level of 70% in Burntwood primary catchment area from 2016				
	[3] based on expenditure growth of 1.0% p.a.				

APPENDIX 9B: SENSITIVITY OF CAPACITY ANALYSIS, COMPARISON GOODS					
£ million in 2001 prices					
Appendix Ref					
	Lichfield	**2011**	**2016**	**2021**	**2026**
4C	capacity - main scenario [1]	-10.92	-33.61	-9.28	23.39
8A	capacity with higher expenditure growth [2]	-6.33	-15.88	13.19	51.71
8B	capacity with higher retention level [3]	-10.92	-27.13	-0.92	34.04
8C	capacity with increased sales productivity [4]	-13.57	-41.35	-23.40	-0.88
8D	capacity with lower growth in Internet shopping [5]	-7.25	-27.32	-4.13	29.90
8E	capacity with higher growth in Internet shopping [6]	-10.92	-47.82	-25.89	2.49
	[1] residual capacity after allowing for commitments				
	[2] annual growth of expenditure of 5.0% from 2006				
	[3] retention level of 70% in Lichfield primary catchment area from 2016				
	[4] increase in sales densities at a rate of 2.8% p.a.				
	[5] growth in Internet spending to 12% in 2026				
	[6] growth in Internet spending to 20% in 2026				
	Burntwood	**2011**	**2016**	**2021**	**2026**
4D	capacity - main scenario [1]	0.02	3.81	9.71	12.70
8F	capacity with higher expenditure growth [2]	1.30	8.10	15.02	19.29
8G	capacity with higher retention level [3]	5.04	9.92	17.26	22.01
8H	capacity with increased sales productivity [4]	-0.19	2.35	6.69	5.80
8J	capacity with lower growth in Internet shopping [5]	1.04	5.33	10.93	14.23
8K	capacity with higher growth in Internet shopping [6]	0.02	0.37	5.79	7.88
	[1] residual capacity after allowing for commitments				
	[2] annual growth of expenditure of 5.0% from 2006				
	[3] retention level of 35% in Burntwood primary catchment area from 2016				
	[4] increase in sales densities at a rate of 2.8% p.a.				
	[5] growth in Internet spending to 12% in 2026				
	[6] growth in Internet spending to 20% in 2026				

APPENDIX 10: SENSITIVITY OF FLOORSPACE CAPACITY

APPENDIX 10A: SENSITIVITY OF FLOORSPACE CAPACITY, CONVENIENCE GOODS				
LICHFIELD	**2011**	**2016**	**2021**	**2026**
capacity - main scenario	-0.32	0.28	9.14	15.42
capacity - upper scenario	0.93	1.87	10.84	17.24
turnover/floorspace ratio (£ per sq.m. net):				
lower	£4,121	£4,247	£4,376	£4,508
upper	£11,334	£11,678	£12,033	£12,398
net floorspace - main scenario	nil	24	760	1,244
max	nil	66	2,089	3,421
net floorspace - upper scenario	82	160	901	1,391
max	226	440	2,477	3,824
gross floorspace - main scenario	nil	34	1,085	1,777
max	nil	94	2,984	4,887
gross floorspace - upper scenario	117	229	1,287	1,986
max	322	629	3,539	5,463
BURNTWOOD	**2011**	**2016**	**2021**	**2026**
capacity - main scenario	1.85	3.81	6.11	9.54
capacity - upper scenario	1.85	12.65	15.73	19.99
turnover/floorspace ratio (£ per sq.m. net):				
lower	£4,121	£4,247	£4,376	£4,508
upper	£11,334	£11,678	£12,033	£12,398
net floorspace - main scenario	163	326	508	769
max	449	897	1,396	2,116
net floorspace - upper scenario	163	1,083	1,307	1,612
max	449	2,979	3,595	4,434
gross floorspace - main scenario	233	466	725	1,099
max	641	1,282	1,995	3,023
gross floorspace - upper scenario	233	1,547	1,867	2,303
max	641	4,255	5,135	6,335
[1] after allowing for commitments				
[2] assuming a net/gross floorspace ratio of 70%				

APPENDIX 10: SENSITIVITY OF FLOORSPACE CAPACITY

APPENDIX 10B: SENSITIVITY OF FLOORSPACE CAPACITY, COMPARISON GOODS				
LICHFIELD	**2011**	**2016**	**2021**	**2026**
capacity - main scenario	-10.92	-33.61	-9.28	23.39
capacity - upper scenario	-6.33	-15.88	13.19	51.71
turnover/floorspace ratio (£ per sq.m. net):				
lower	£4,460	£4,972	£5,544	£6,181
upper	£6,355	£7,086	£7,900	£8,808
net floorspace - main scenario	nil	nil	nil	2,656
max	nil	nil	nil	3,784
net floorspace - upper scenario	nil	nil	1,670	5,871
max	nil	nil	2,379	8,366
gross floorspace - main scenario	nil	nil	nil	3,794
max	nil	nil	nil	5,406
gross floorspace - upper scenario	nil	nil	2,385	8,387
max	nil	nil	3,399	11,951
BURNTWOOD	**2011**	**2016**	**2021**	**2026**
capacity - main scenario	0.02	3.81	9.78	12.78
capacity - upper scenario	5.09	9.98	17.33	22.09
turnover/floorspace ratio (£ per sq.m. net):				
lower	£4,460	£4,972	£5,544	£6,181
upper	£6,355	£7,086	£7,900	£8,808
net floorspace - main scenario	nil	538	1,238	1,451
max	nil	766	1,764	2,068
net floorspace - upper scenario	801	1,408	2,194	2,508
max	1,141	2,007	3,126	3,574
gross floorspace - main scenario	nil	768	1,769	2,073
max	nil	1,095	2,520	2,954
gross floorspace - upper scenario	1,144	2,012	3,134	3,583
max	1,630	2,867	4,466	5,106
[1] after allowing for commitments				
[2] assuming a net/gross floorspace ratio of 70%				

APPENDIX 11

HEALTH CHECKS OF LICHFIELD AND BURNTWOOD CENTRES

Approach

England & Lyle carried out health check appraisals of Lichfield city centre and Burntwood town centre in March 2007 to assess their vitality and viability using a range of indicators and factors. The appraisals were updated in February 2009. The approach used is a health check appraisal using the indicators listed in PPS6 on Measuring Vitality and Viability. Each indicator is sub-divided into a number of more detailed 'Factors' which are given a score from 1 to 5 according to our assessment of their rating on a 5 point scale (1 = very poor; 2 = poor; 3 = fair; 4 = good; 5 = very good). The appraisal includes a total of 40 factors. An average score is produced for all the factors present and this gives an overall index of the health of the centre.

Information for input to the health check appraisals is derived mostly from our detailed surveys of all the two centres and from observation of the centres. In the case of Lichfield we have also used information from the health check carried out by DPP in connection with the planning application for redevelopment of the Tesco superstore in Lichfield, which itself draws on earlier health checks carried out in Lichfield. The appraisal framework allows comparison between centres and it can be repeated at intervals to monitor changes in the health of a centre. We have applied this approach to a large number of centres nationally and it has proved to a very reliable method of assessing the vitality and viability of centres. Experience shows that the vitality and viability index will tend to range from about 2.5 for a centre that is performing poorly with a low level of vitality and viability to 4.0 or more for a centre which is performing well with a high level of vitality and viability.

From the surveys of centres we have prepared a database for each centre including information on individual properties. The database contains information on address, name of business, type of business, use class, the physical appearance of properties, and floorspace. The full survey details are included in the report Background Retail Review in Appendix 1 for Lichfield and Appendix 2 for Burntwood. Copies of the Health Check Appraisal Sheets for both centres are included in Appendix 12 of this Update report.

The approach is applicable to all types of centre including small towns and larger local centres. Information on a number of the factors, such as commercial performance and retailer demand, is not available for small centres but the appraisal is based on those factors that are present. The main value of this approach is that it enables a qualitative but systematic appraisal of all centres to be carried out. Therefore centres can be compared on a consistent basis to assess their vitality and viability.

Health Checks

Lichfield City Centre

The health of Lichfield city centre was assessed by England & Lyle in March 2007. It was assessed again in February 2009. This Appendix reports on the latest appraisal and comments on changes since the previous appraisal. The main change in Lichfield in the last two years is the environmental improvements that have taken place in the city centre.

Overall provision

In terms of overall provision, PPS6 attaches importance to the amount of retail and other floorspace outside the centre and the capacity for growth or change in the centre. In Lichfield city centre we rate floorspace outside the centre as good because, although there are edge-of-centre Tesco and Aldi stores, and out-of-centre Morrisons and Waitrose stores, Lichfield does not have a large amount of out-of-centre shopping which could compete with the city centre. At the time of this Update the Tesco store was in the process of being redeveloped. Capacity for growth in the centre is constrained physically to the north by the historic Cathedral and its surroundings. However, opportunities exist close to the southern edge of the city centre, notably in and around Birmingham Road where the large Friarsgate redevelopment scheme has been approved. The entirety of the existing town centre shopping provision is set within the city centre Conservation Area. Other opportunities for growth within the centre have already been realised through the development of the Three Spires Centre. However, there may be further potential for redevelopment of car park sites. Capacity for growth or change in the centre is rated as good and this is a higher score than we gave in the 2007 appraisal before the Friarsgate and Tesco schemes were approved.

Diversity of uses

Lichfield city centre has a total of 161 retail units. The number and type of shops and the provision of pubs, cafes, restaurants and hotels are all rated as good. Cultural and entertainment facilities are good, due to the presence of the cathedral, museums, heritage buildings such as the Guildhall, the Lichfield Heritage Centre, the Garrick Theatre and the Lichfield campus of Staffordshire University. The range of financial and professional services such as banks, building societies and travel agents, and business and office premises, is rated as fair. Sports and leisure facilities are also fair. The Friary Grange and King Edward VI Leisure Centres are located outside the city centre.

Retailer representation

Lichfield has 35 non-food multiples, a quarter of all comparison goods shops, which is a reasonable representation for a centre of its size. Multiples include Burtons, Boots, WH Smith, TJ Hughes, Superdrug, Argos and Poundstretcher, but there are no department stores. The variety of specialist and independent shops is fair, with a particularly notable representation in Dam Street near to the cathedral. General Markets take place on Tuesday, Friday and Saturday each week. A Farmers' Market is held on the first Thursday of the month (except January) and an Antiques Market on the third Thursday of each month. It is evident that a wide choice of existing, good quality street markets are regularly available in the city centre, with access to local produce, which we rate it as good.

The availability of food shopping is rated as fair. There are two supermarkets in the city centre (M&S Simply Food and Iceland) and there are edge-of-centre Tesco and Aldi stores, but the proportion of convenience goods shops (5% of all retail and commercial properties) is low. There is limited availability of enclosed shopping in the city centre and this is rated as fair. The City Arcade is small and of poor quality. The Three Spires Centre is a modern precinct but it is not an enclosed centre. Evidence of recent investment by retailers is rated as good, notably in the Three Spires Centre. Retailer demand, according to Focus data, is generally good and has improved between 2001 and 2007, but it declined slightly in 2008. The Friarsgate (Birmingham Road) scheme will provide the opportunity for new retailers to locate in the centre, including a Debenhams department store. The lack of charity shops is good, with only 5 charity shops in the centre. The presence of low quality discount shops is rated as fair – numbers are generally low but they are situated in prominent locations, particularly Market Street.

Vacant properties

Our inspection of the centre in February 2009 found only 10 vacant properties, a reduction on the 2007 total of 14 vacant units. The vacancy rate is currently just 3% of all retail commercial properties, compared with the national average of just over 10%, and it is rated as good. The amount of vacant floorspace is low but it includes some large units such as the former Woolworths and Kwik Save properties. The proportion of vacant floorspace is rated as good. Vacant floorspace does not have a negative effect on the attractiveness of the city centre, and is also rated as good.

Commercial performance

Rental levels in Lichfield are below the regional average. Rental values have increased in recent years to almost £100 per sq. foot but they are below rentals in the neighbouring towns of Walsall and Burton, and this factor is rated as fair. Shopping centre yield in Lichfield has improved recently from 7.5 in 2005 to 6.0 in January 2008 but it worsened slightly to 6.25 in July 2008. The current level of yield in Lichfield compares with 6.0 in Walsall, 3.75 in Burton-on-Trent and 7.0 in Tamworth. Overall this factor is rated as good.

Pedestrian flows

The highest pedestrian flows are in and around the Three Spires Centre, the central Market Place, and in the pedestrianised Bore Street. They are lowest at the south end of Market Street, in Bird Street and in Tamworth Street. We rate pedestrian flows as good. The centre has benefited from the recent improvements to the pedestrian environment in Bore Street, Market Place and Breadmarket Street.

Acccessibility

Lichfield scores relatively well on factors of accessibility. Ease of movement for pedestrians, cyclists and the less mobile is good. There is disabled parking in the pedestrianised part of Tamworth Street and Bore Street, with a shopmobility service available from the bus station. Ease of access to the main attractions in the centre is good. There is good signage in the city centre for all the main facilities – notably at Bakers Lane/Tamworth Street, outside the Guildhall, outside the Garrick Theatre, in Dam Street and Bird Street, and in the Bird Street car park. There are good information boards at several locations in the city centre. Car parking is generally good, with a range of car park sizes and types, all well distributed around the centre.

The frequency and quality of public transport and range of places served by us are rated as good. The bus station is conveniently located on Birmingham Road, 100 metres from the Three Spires Centre, and opposite Lichfield City railway station. Local bus services offer good quality regular services (every 30 minutes in most cases) to Alrewas, Burntwood, Burton, Cannock, Fradley, Handsacre, Hednesford, Rugeley, Stafford, Tamworth and Whittington.

<u>Customer views and behaviour</u>

No information is available in relation to customer views and behaviour for Lichfield City Centre. Although a household survey was undertaken in connection with the 2004 Retail Study, it does not refer specifically to customers' satisfaction with the city centre or the need for improvements. However, the household survey does show leakage from Lichfield District and we interpret this as an indicator of some lack of satisfaction with the city centre and the need for some improvements. There is an opportunity for linked trips between the new Tesco supermarket and the city centre but physical linkages are not particularly good at present. Customer views and behaviour are rated as fair.

<u>Safety and security</u>

Lichfield city centre does not appear to have significant problems of safety and security. A CCTV system has been installed and good lighting has been introduced. CCTV is available in the main shopping area of the Three Spires Centre. The feeling of security is rated as good.

<u>Environmental quality</u>

To assess environmental quality, as part of our survey of the city centre we noted the physical appearance of all retail and commercial properties, using a 5-point scale from 1 for very poor to 5 for very good. The overall score obtained is 3.3 which is better than average. More than half of all properties were rated as fair and most of the others were rated as good rather than poor. Overall cleanliness is good.

The general pedestrian environment and the quality of open spaces/landscaping are rated as very good. In both cases this represents an improved score on the 2007 appraisal because of the completion of the environmental improvements that were taking place at that time. Environmental quality is particularly good in the Market Place, Bore Street, the northern end of Dam Street and Bird Street adjacent to the Friary site. Beacon Park, Minster Pool and Friary Gardens are particularly attractive. The pedestrianised streets are attractive but there is some conflict between pedestrians and vehicles using Bore Street. Public conveniences tend to be located outside the main shopping area and the availability and condition of toilets is rated as fair.

Burntwood Town Centre

The health of Burntwood town centre was assessed by England & Lyle in March 2007. It was assessed again in February 2009. This Appendix reports on the latest appraisal and comments on changes since the previous appraisal. The main change in Burntwood in the last two years is the re-occupation of the former Somerfield/Peacocks store as a Tesco Metro supermarket.

Overall provision

There is no retail and other floorspace in Burntwood outside the town centre, other than the designated local centres, and so this factor is rated as good. Capacity for growth or change in the town centre is rated as very good as a significant opportunity exists to extend the town centre to the south and west. This is established in policy terms through the retail allocation in the town centre contained in the adopted Local Plan. The score on capacity for growth or change in the centre represents an increase since the 2007 appraisal because of the approval of the Hoardings scheme and the identification of potential on the Olaf Johnson site.

Diversity of uses

Burntwood has the character of a suburban district centre. It has a total of 23 retail units and 32 service units. The town centre is rated as fair in terms of the number and type of shops, financial and professional services, business and office premises and pubs, cafes and restaurants. Sports and leisure facilities are rated as good because of the location of the sports complex based around Burntwood Leisure Centre, on the edge of the town centre. Cultural and entertainment facilities are rated as poor. There are no hotels in the town centre so this factor is not rated.

Retailer representation

Burntwood has only 3 non-food multiples, of which 2 are pharmacies. The former Peacocks unit which was part of the Somerfield store, has closed and has been taken over by Tesco. The representation of multiples is poor for a town of its size. The variety of specialist and independent shops is rated as fair. The availability of food shopping is good because of the presence of the Morrisons and Tesco supermarkets and a variety of other food shops. Evidence of recent investment by retailers, principally the Tesco development, is rated as fair. Information on retailer demand from the Focus database shows there are only two retailer requirements in Burntwood and this factor is rated as poor. Only one charity shop exists in the town centre, which we rate as good, and the presence of low quality discount shops is fair. There is no enclosed shopping, street markets or information available relating to retailer demand in the town centre so these factors are not scored.

Vacant properties

There are no vacant units in Burntwood town centre. Therefore the vacancy rate and the amount of vacant floorspace are rated as very good. Vacant floorspace clearly does not have a negative effect on the centre and so it is also rated as very good. All these scores represent an improvement on the 2007 appraisal.

Commercial performance

No information is available on rental values and shopping centre yield in Burntwood town centre because of the size of the centre.

Pedestrian flows

The volume of pedestrian flow in the town centre at the time of our original survey and the latest survey was fair. Pedestrian flows are strongest in and around the main Burntwood Town Shopping Centre complex, with limited flows between the main part of the town centre at Sankeys Corner and Morrisons to the south.

Accessibility

Ease of movement for pedestrians, cyclists and the less mobile in Burtwood is fair rather than good because Cannock Road runs through the town centre and tends to act as a barrier to north-south movement. Ease of access to the main attractions in the centre is fair. A good choice of car parking is available to the rear of the Town Shopping Centre complex, to the rear of Tesco and at the Morrisons store. Morrisons car park is well used and does not appear to have time restrictions. Tesco offers 3 hours free car parking. The frequency and quality of public transport and range of places served by bus are rated as good. There are bus links to Burntwood from Lichfield, Cannock, Brownhills and Walsall.

Customer views and behaviour

No information is available in relation to customer views and behaviour in relation to Burntwood town centre. However, the household survey suggests a high leakage of trade from Burntwood to other centres. Satisfaction with the centre and the need for improvements are rated as poor. It is possible to make linked trips between Morrisons and the main centre around Sankey's Corner. In both the original and latest visits to Burntwood we observed several people walking between Morrisons and Sankey's Corner via the Tesco (formerly Somerfield) car park but it is not an attractive route for pedestrians and this factor is rated as fair.

Safety and security

Our perception of the overall feeling of safety and security in Burntwood town centre is good. There is a single CCTV camera in the centre. This is an improvement over the score in the 2007 appraisal based on a re-consideration of the level of safety and security in the town centre.

Environmental quality

The averagel score obtained on physical appearance of retail and commercial properties in Burntwood town centre using a 5-point scale is 2.9. More than half of all properties were rated as fair. Overall cleanliness, the general pedestrian environment and the quality of open spaces/landscaping are rated as fair. The disused site next to Tesco and the Olaf Johnson site are both in a poor environmental condition and tend to detract from the character of the centre. The availability and condition of public toilets is poor but toilets are available in Morrisons.

Vitality and Viability of the Centres

The overall vitality and viability index obtained on the health check appraisal for Lichfield is 3.7 which is a relatively high level of vitality and viability. Lichfield's main strengths are the small amount of floorspace outside the centre; the capacity for growth and change in the centre; a good diversity of main town centre uses; generally good retailer representation; low vacancies; improving commercial performance; high volume of pedestrian flow; high level of accessibility; safety and security; and high environmental quality including a very good pedestrian environment and quality of open spaces and landscaping. Lichfield has no identified weaknesses. Unusually for this type of appraisal, no single factor has been rated as poor. The overall vitality and viability index has increased from 3.6 in March 2007 to 3.7 in February 2009. The vitality and viability of the centre is strong and it will improve even further when the Friarsgate (Birmingham Road) redevelopment scheme takes place.

The overall vitality and viability index obtained on the health check appraisal for Burntwood is 3.3 which is above average. Burntwood's main strengths are the lack of floorspace outside the centre; the capacity for growth and change in the centre; sports and leisure facilities; the availability of food shopping; lack of charity shops; lack of vacancies; availability of car parking; good public transport. Its main weaknesses are in terms of the limited range of shops; low retailer demand; high leakage of trade and a generally poor shopping environment. The overall vitality and viability index has increased from 3.2 in March 2007 to 3.3 in February 2009. However, Burntwood is a centre in need of improvement. It needs to have an improved retail offer and a consolidation of its retail provision to increase the critical mass of shopping in the centre.

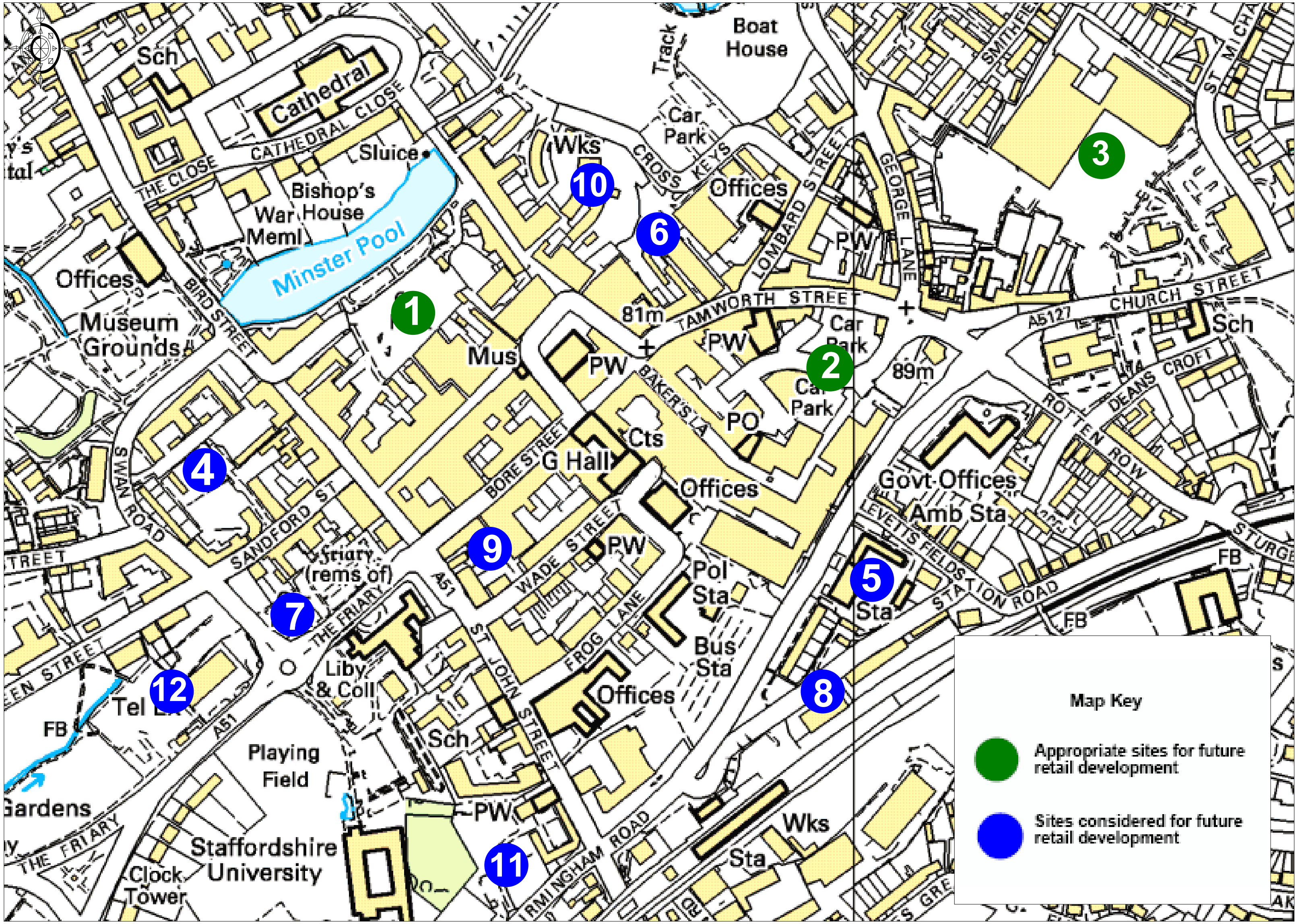
APPENDIX 12: HEALTH CHECK APPRAISALS

LICHFIELD CITY CENTRE HEALTH CHECK APPRAISAL (FEBRUARY 2009)		
		*
INDICATOR	**FACTOR**	**SCORE**
Overall Provision	Retail and other floorspace outside centre	4
	Capacity for growth or change in the centre	4
Diversity of Main	Number and type of shops	4
Town Centre Uses	Financial and professional services	3
	Business and office premises	3
	Pubs, cafes and restaurants	4
	Hotels	4
	Cultural and entertainment facilities	4
	Sports and leisure facilities	3
Retailer	Number of multiple retailers	3
Representation	Variety of specialist/independent shops	3
	Existence and quality of street markets	4
	Availability of food shopping	3
	Availability of enclosed shopping	3
	Evidence of recent investment by retailers	4
	Retailer Demand	4
	Presence of Charity shops	4
	Presence of low quality discount shops	3
Vacant Properties	Vacancy rate	4
	Vacant floorspace	4
	Effect of vacant premises on the centre	4
Commercial	Rental values	3
Performance	Shopping centre yield	4
Pedestrian Flows	Volume of pedestrian flow	4
Accessibility	Ease of movement for pedestrians	4
	Ease of movement for cyclists	4
	Ease of movement for the less mobile	4
	Ease of access to main attractions	4
	Car parking	4
	Frequency and quality of public transport	4
	Range of places served by bus	4
Customer Views	Satisfaction with the centre	3
and Behaviour	Need for improvements	3
	Linked trips	3
Safety and Security	Feeling of security (eg CCTV)	4
Environmental	Physical appearance of properties	3.3
Quality	Overall cleanliness (litter and graffiti)	4
	General pedestrian environment	5
	Quality of open spaces/ landscaping	5
	Availability and condition of toilets	3
	VITALITY AND VIABILITY INDEX	**3.7**
* 1 = very poor; 2 = poor; 3 = fair; 4 = good; 5 = very good		

APPENDIX 12: HEALTH CHECK APPRAISALS

BURNTWOOD TOWN CENTRE HEALTH CHECK APPRAISAL (FEBRUARY 2009)		
		*
INDICATOR	FACTOR	SCORE
Overall Provision	Retail and other floorspace outside centre	4
	Capacity for growth or change in the centre	5
Diversity of Main	Number and type of shops	3
Town Centre Uses	Financial and professional services	3
	Business and office premises	3
	Pubs, cafes and restaurants	3
	Hotels	
	Cultural and entertainment facilities	2
	Sports and leisure facilities	4
Retailer	Number of multiple retailers	2
Representation	Variety of specialist/independent shops	3
	Existence and quality of street markets	
	Availability of food shopping	4
	Availability of enclosed shopping	
	Evidence of recent investment by retailers	3
	Retailer Demand	2
	Presence of Charity shops	4
	Presence of low quality discount shops	3
Vacant Properties	Vacancy rate	5
	Vacant floorspace	5
	Effect of vacant premises on the centre	5
Commercial	Rental values	
Performance	Shopping centre yield	
Pedestrian Flows	Volume of pedestrian flow	3
Accessibility	Ease of movement for pedestrians	3
	Ease of movement for cyclists	3
	Ease of movement for the less mobile	3
	Ease of access to main attractions	3
	Car parking	4
	Frequency and quality of public transport	4
	Range of places served by bus	4
Customer Views	Satisfaction with the centre	2
and Behaviour	Need for improvements	2
	Linked trips	3
Safety and Security	Feeling of security (eg CCTV)	4
Environmental	Physical appearance of properties	2.9
Quality	Overall cleanliness (litter and graffiti)	3
	General pedestrian environment	3
	Quality of open spaces/ landscaping	3
	Availability and condition of toilets	2
	VITALITY AND VIABILITY INDEX	**3.3**
* 1 = very poor; 2 = poor; 3 = fair; 4 = good; 5 = very good		

Appendix 13



This map was created with Promap

APPENDIX 14: RETAIL IMPACT ASSESSMENT, COMPARISON GOODS, BURNTWOOD

RETAIL IMPACT ASSESSMENT, COMPARISON GOODS, 2016 (in 2001 prices)

APPENDIX 14A: PROPOSALS BY LCP FOR RETAIL DEVELOPMENT IN BURNTWOOD

		LCP Burntwood scheme (Hoardings site)		
	comparison turnover 2016 (£m)	share of trade draw (1)	trade diversion £m (2)	trading impact %
Study Area				
Burntwood town centre (2)	10.8	1%	0.3	3.2%
Lichfield city centre (3)	169.6	20%	7.0	4.1%
Brownhills	22.7	2%	0.7	3.1%
Other stores and centres (4)	16.3	2%	0.7	4.3%
Study area total	219.4	25%	8.7	4.0%
Clawback (5)				
Walsall	406.3	20%	7.0	1.7%
Cannock	181.7	15%	5.2	2.9%
Tamworth	226.0	-	-	-
Stafford	273.9	-	-	-
Burton-on-Trent	332.9	-	-	-
Out-of-centre stores	-	35%	12.2	-
Total clawback	-	70%	24.4	-
Inflow of trade	-	5%	1.7	-
Total	-	100%	34.8	-

(1) small inflow assumed (mostly from Lichfield)
(2) turnover includes Morrisons extension
(3) includes Friarsgate scheme
(4) retail warehouses in Lichfield, including Vulcan Road, and local centres in Burntwood
(5) clawback of leakage from centres outside study area:
turnover estimates from Regional Centres Study (March 2006) assuming growth in turnover at 2.2% p.a.

RETAIL IMPACT ASSESSMENT, COMPARISON GOODS, 2026 (in 2001 prices)

APPENDIX 14B: PROPOSALS FOR LONGER TERM RETAIL DEVELOPMENT IN BURNTWOOD INCLUDING FURTHER COMPARISON GOODS DEVELOPMENT ON THE OLAF JOHNSON SITE

		LCP Burntwood scheme			Olaf Johnson site			Cumulative	
	comparison turnover 2026 (£m) (1)	share of trade draw	trade diversion £m (1)	trading impact %	share of trade draw	trade diversion £m (2)	trading impact %	trade diversion £m	trading impact %
Study Area									
Burntwood town centre (3)	13.4	1%	0.4	3.2%	1%	0.1	0.9%	0.6	4.2%
Lichfield city centre (4)	210.8	20%	8.7	4.1%	20%	2.5	1.2%	11.2	5.3%
Brownhills	28.2	2%	0.9	3.1%	2%	0.3	0.9%	1.1	4.0%
Other stores and centres (5)	20.3	2%	0.9	4.3%	2%	0.3	1.3%	1.1	5.5%
Study area total	272.7	25%	10.8	4.0%	25%	3.2	1.2%	14.0	5.1%
Clawback (6)									
Walsall	505.1	20%	8.7	1.7%	20%	2.5	0.5%	11.2	2.2%
Cannock	225.9	15%	6.5	2.9%	15%	1.9	0.8%	8.4	3.7%
Tamworth	280.9	-	-	-	-	-	-	-	-
Stafford	340.5	-	-	-	-	-	-	-	-
Burton-on-Trent	413.9	-	-	-	-	-	-	-	-
Out-of-centre stores	-	35%	15.1	-	35%	4.4	-	19.6	-
Total clawback	-	70%	30.3	-	70%	8.9	-	39.2	-
Inflow of trade	-	5%	2.2	-	5%	0.6	-	2.8	-
Total	-	100%	43.3	-	100%	12.7	-	56.0	-

(1) assuming continued growth in turnover at a rate of 2.2% p.a.
(2) comparison goods turnover in 2026 based on capacity of £12.7m (Appendix 5B)
(3) turnover includes Morrisons extension
(4) includes Friarsgate scheme
(5) retail warehouses in Lichfield, including Vulcan Road, and local centres in Burntwood
(6) clawback of leakage from centres outside study area:
turnover estimates from Regional Centres Study (March 2006) assuming growth in turnover at 2.2% p.a.

RETAIL IMPACT ASSESSMENT, COMPARISON GOODS, 2026 (in 2001 prices)

APPENDIX 14C: PROPOSALS FOR LONGER TERM RETAIL DEVELOPMENT IN BURNTWOOD
ASSUMING BULKY GOODS DEVELOPMENT ON THE LCP HOARDINGS SITE

		LCP Burntwood - bulky goods			**Olaf Johnson site**			**Cumulative**	
	comparison turnover 2026 (£m) (1)	share of trade draw	trade diversion £m (2)	trading impact %	share of trade draw	trade diversion £m	trading impact %	trade diversion £m	trading impact %
Study Area									
Burntwood town centre (3)	13.4	1%	0.3	2.2%	1%	0.1	0.9%	0.4	3.1%
Lichfield city centre (4)	210.8	12%	3.5	1.7%	20%	2.5	1.2%	6.0	2.9%
Brownhills	28.2	2%	0.6	2.1%	2%	0.3	0.9%	0.8	3.0%
Other stores and centres (5)	20.3	10%	2.9	14.3%	2%	0.3	1.3%	3.2	15.6%
Study area total	272.7	25%	7.3	2.7%	25%	3.2	1.2%	10.4	3.8%
Clawback (6)									
Walsall	505.1	15%	4.4	0.9%	20%	2.5	0.5%	6.9	1.4%
Cannock	225.9	10%	2.9	1.3%	15%	1.9	0.8%	4.8	2.1%
Tamworth	280.9	-	-	-	-	-	-	-	-
Stafford	340.5	-	-	-	-	-	-	-	-
Burton-on-Trent	413.9	-	-	-	-	-	-	-	-
Out-of-centre stores	-	45%	13.1	-	35%	4.4	-	17.5	-
Total clawback	-	70%	20.3	-	70%	8.9	-	29.2	-
Inflow of trade	-	5%	1.5	-	5%	0.6	-	2.1	-
Total	-	100%	29.0	-	100%	12.7	-	41.7	-

(1) assuming continued growth in turnover at a rate of 2.2% p.a.
(2) bulky goods turnover in 2026 based on a floorspace of 7,500 sq.m. net @ £3,863 per sq.m.
(3) turnover includes Morrisons
(4) includes Friarsgate scheme
(5) retail warehouses in Lichfield, including Vulcan Road, and local centres in Burntwood
(6) clawback of leakage from centres outside study area:
turnover estimates from Regional Centres Study (March 2006) assuming growth in turnover at 2.2% p.a.