

TAMWORTH TOWN CENTRE & RETAIL
STUDY 2024 (VOLUME 1 — MAIN
REPORT)

FIRSTPLAN FOR TAMWORTH
BOROUGH COUNCIL

04 FEBRUARY 2025

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Broadwall House
21 Broadwall
London SE1 9PL

020 3096 7000
info@firstplan.co.uk
firstplan.co.uk

FIRSTPLAN

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SECTION 1 | INTRODUCTION

1.1 Firstplan have been instructed to provide **Tamworth Borough Council** ('the Council') with advice on future retail and town centre needs for the Borough. The study will form an important part of the evidence base for the Council's new Local Plan Update, which will provide strategic guidance for development in the Borough over the period to 2043.

1.2 The study seeks to update the findings of the Council's existing retail and town centres evidence base study which was published in 2011. As our report sets out, in the intervening period there have been fundamental changes to the sector and on this basis an updated assessment of future needs is timely. Town centres at all levels of the retail hierarchy, and all across the country, have had to adapt to a number of key challenges and changes — and will continue to have to adapt in the future — in order to ensure they remain vital and viable destinations which are able to meet the needs of local residents in a sustainable manner.

Scope of works

1.3 The scope of works for the study, as defined by the Council, is as follows:

- *Planning policy overview and identification of current centre hierarchy in Tamworth.*
- *Analysis of recent trends in the retail sector likely to impact on the need for retail and town centre uses over the plan period.*
- *Health checks of the town centre and local centres.*
- *Retail needs assessment informed by population and expenditure data obtained from Experian and a new household survey to provide an assessment of the need for new convenience and comparison goods floorspace over the plan period.*
- *Need assessment for other main town centre uses;*
- *Policy recommendations.*
- *Any other outcomes identified through regulation or best practice.*

Study context

1.4 The outputs of this study have had full regard to the wider economic and other factors prevalent at the time of preparation of this study. Most significantly in recent years, the Covid-19 pandemic brought about a significant upturn in online shopping (which was already increasing prior to the Covid-19 pandemic), but has also changed how people live and work, with potential opportunities for local high streets and town centres arising from increased levels of homeworking in some locations. The upturn in online shopping in turn reduces the demand by many operators for physical floorspace, meaning that town centres have had to diversify in order to attract footfall and spend.

1.5 Changes to national planning legislation, and in particular the introduction of the class E planning use class, since the last study, will also impact on the strategic planning of town centres moving forward, and our study provides an explanation of the implication of these changes. Recent years have also seen many town centres affected by national retail closures such as Arcadia Group (Topshop, Topman, Burton), Debenhams and Wilko, and the downsizing of other retailers such as House of Fraser and John Lewis.

1.6 In order to accurately capture the impact of the above changes and gain a clear understanding of where residents of Tamworth Borough and its surrounding catchment are visiting for their shopping and leisure trips, **a new household telephone survey of shopping and leisure patterns has been undertaken in support of the study.** Specifically, the survey captures patterns of shopping for comparison goods, convenience (food)

goods, different types of commercial leisure activity (such as dining out, visiting cinemas, entertainment venues and so on), as well as identifying how residents use Tamworth town centre. The new survey also captures the amount of local residents' spend which is spent online. The survey was developed in collaboration with the Council and undertaken by a specialist market research consultancy, NEMS Market Research.

- 1.7 The focus of the study is on Tamworth town centre, the defined local and neighbourhood centres across the Borough, as well as the significant concentrations of retail warehousing which are predominantly located to the west of the town centre on and around Ventura Park Road. The scale of the retail warehouse offer in Tamworth is considerable relative to the size of the town and invariably means there is competition between the two locations for local residents' spending. Tamworth is also served by a network of large foodstores across its urban area, and in recent years has seen a number of new openings from retailers such as Aldi and Lidl, reflecting wider trends seen across the country. Tamworth also has a number of large-scale leisure facilities located within and adjacent to its town centre, including an Odeon multiplex cinema and indoor snowdome.

Structure of report

- 1.8 The study can essentially be split into four parts, which together form **Volume 1** to this report. **Part 1** sets out the context within which the study is being prepared, considering the local and national policy context. **Part 2** sets out the evidence of the current performance of the network of centres in the Borough, focussing on Tamworth town centre but also considering the network of smaller local and neighbourhood centres in the Borough. **Part 3** considers the need for new retail and town centre uses floorspace in the Borough over the Council's new Local Plan period, informed by the findings of the household survey, and **Part 4** draws together the findings of Parts 1-3 to provide a series of strategic conclusions and recommendations for the Council to consider taking forward into future strategic planning documents. Our report is thus structured accordingly:

Section number	Description
	PART 1 — STUDY CONTEXT
2	Planning policy context — sets out the national and local planning policy context within which this study has been prepared, as well as overview of current planning legislation in respect of class E, and an overview of the current development plan position of surrounding authorities.
3	Market context — Sets out the market context within which this study has been prepared, focussing on key trends in the retail and town centres sector which have come about since the Council's last retail study in 2011.
4	Development in competing centres — provides a summary of the recent and planned development in centres surrounding the Borough, to establish whether there is any development which may influence patterns of shopping and leisure of Tamworth Borough residents in the future.
	PART 2 — TOWN CENTRE PERFORMANCE
5	Tamworth town centre health check — assessment of current performance of Tamworth town centre, plus local and neighbourhood centres key services assessment — audit of key facilities in each of the Borough's local and neighbourhood centres.
	PART 3 — IDENTIFICATION OF NEEDS

6	Approach to household survey — sets out the background to the household telephone survey, the survey area and zones, and methodological approach.
7	Comparison goods shopping patterns & identification of need — Identifies the quantitative need for additional comparison (non-food) goods floorspace which the Council will need to plan for over its new Local Plan period.
8	Convenience shopping patterns & identification of need — Identifies the quantitative need for additional convenience (food) goods floorspace which the Council will need to plan for over its new Local Plan period.
9	Commercial leisure needs assessment — Sets out analysis of current provision of leisure and other main town centre uses in the Borough and analysis of potential future needs.
PART 4 — STRATEGY & RECOMMENDATIONS	
10	Strategic recommendations — Draws together findings of preceding chapters to create a series of strategic recommendations to inform the Council's development plan preparation.

1.9 The main report is supported by a series of appendices which together form **Volume 2** to this report¹. The household survey results are set out separately as **Volume 3**.

About the authors

- **Firstplan** are an established and growing independent planning consultancy who work on a wide range of public and private sector projects across London and the wider country, including extensive experience in town centres, retail needs assessments and the provision of strategic planning advice.
- **NEMS Market Research** was established in 1981 and is a dedicated full-service market research consultancy. They are highly experienced in both quantitative and qualitative methods, and analytical and interpretative skills. NEMS Market Research have acted as sub-consultants to Firstplan on this study.

¹ A list of appendices at Volume 2 is set out on the contents page to this volume.

SECTION 2 | PLANNING POLICY CONTEXT

2.1 In this section we summarise the key features of national and local planning policy guidance which provides the context and framework under which this study has been prepared.

National Planning Context

National Planning Policy Framework (NPPF 2024)

2.2 The most up-to-date iteration of the National Planning Policy Framework (NPPF) was published on 12 December 2024 and sets out the Government's planning policies for England and how these should be applied (Paragraph 1). The NPPF must be taken into account in preparing the development plan and is a material consideration in planning decisions (Paragraph 2). At the heart of the Framework is a presumption in favour of sustainable development (Paragraph 10).

2.3 The NPPF is clear that Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application (Paragraph 12). Thus, in terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise (Paragraph 48).

2.4 Local Planning Authorities ('LPAs') should ensure that the preparation and review of all policies is underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, and consider relevant market signals (Paragraph 32). Local plans and spatial development strategies are examined by an independent planning inspector to assess whether they have been prepared in accordance with legal and procedural requirements, and whether they are sound. Plans are 'sound' if they are (Paragraph 36):

- a) **Positively prepared** – providing a strategy which, as a minimum, seeks to meet the area's objectively assessed needs; and is informed by agreements with other authorities, so that unmet need from neighbouring areas is accommodated where it is practical to do so and is consistent with achieving sustainable development;
- b) **Justified** – an appropriate strategy, taking into account the reasonable alternatives, and based on proportionate evidence;
- c) **Effective** – deliverable over the plan period, and based on effective joint working on cross-boundary strategic matters that have been dealt with rather than deferred, as evidenced by the statement of common ground; and
- d) **Consistent with national policy** – enabling the delivery of sustainable development in accordance with the policies in this Framework and other statements of national planning policy, where relevant.

2.5 The NPPF advocates a 'town centres first' approach and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should (Paragraph 90):

- a) define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- b) define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;

- c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
- f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.6 As set out in Section 7 of the NPPF, local planning authorities are required to apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Paragraph 92 explains that main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered. The NPPF also requires that when assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (the current thresholds for Tamworth Borough are discussed separately below).

Planning Policy Guidance (PPG) 'Town Centres & Retail' (2014 and updated)

2.7 In March 2014 the then Department for Communities and Local Government (DCLG) launched the online planning practice guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). The document is a 'live' web-based resource that is updated as necessary, although the guidance in respect of town centres and retail has not been subject to a comprehensive update since 2019.

2.8 Although it does not constitute a statement of Government policy, the Town Centres & Retail PPG provides technical guidance on how to prepare a robust evidence base, how to monitor the vitality and viability of town centres, and how to assess the impact of proposals for main town centre uses which fall outside of town centres. The web-based resource also provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.

2.9 The Town Centres & Retail PPG identifies that the following indicators, and their changes over time, may be relevant in assessing the health of town centres, and planning for their future. The range of indicators used for assessing town centre vitality and viability was broadened following an update to this section of the PPG in 2019 to include factors such as opening hours, and evidence of whether there are considered to be any identifiable barriers in place which may prevent the expansion of existing businesses/ opening of new ones.

- diversity of uses;
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- customers' experience and behaviour;
- retailer representation and intentions to change representation;
- commercial rents;

- pedestrian flows;
- accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements;
- perception of safety and occurrence of crime;
- state of town centre environmental quality;
- balance between independent and multiple stores;
- extent to which there is evidence of barriers to new businesses opening and existing businesses expanding; and
- opening hours/availability/extent to which there is an evening and night time economy offer.

National Legislative Context

Changes to the Use Classes Order

2.10 Since the Council's last retail study, a significant change in respect of the Use Classes Order has come into legalisation, via the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 (which came into force on 1 September 2020). The most significant element of this been the introduction of three new use classes, class E, class F1 and class F2, which collectively have been designed to allow for a greater range of flexibility in the range of uses which can be accommodated in town centres without requiring planning permission.

2.11 Use Class E covers, in broad terms, uses which were previously defined in the revoked Classes A1/2/3, B1, D1(a-b) and 'indoor sport' from D2(e):

- E(a) Display or retail sale of goods, other than hot food
- E(b) Sale of food and drink for consumption (mostly) on the premises
- E(c) Provision of:
 - E(c)(i) Financial services,
 - E(c)(ii) Professional services (other than health or medical services), or
 - E(c)(iii) Other appropriate services in a commercial, business or service locality
- E(d) Indoor sport, recreation or fitness (not involving motorised vehicles or firearms or use as a swimming pool or skating rink,)
- E(e) Provision of medical or health services (except the use of premises attached to the residence of the consultant or practitioner)
- E(f) Creche, day nursery or day centre (not including a residential use)
- E(g) Uses which can be carried out in a residential area without detriment to its amenity:
 - E(g)(i) Offices to carry out any operational or administrative functions,
 - E(g)(ii) Research and development of products or processes
 - E(g)(iii) Industrial processes

2.12 The new use class F is split into two parts covering uses previously defined in the revoked classes D1, 'outdoor sport', 'swimming pools' and 'skating rinks' from D2(e), as well as newly defined local community uses:

- F1 Learning and non-residential institutions – Use (not including residential use) defined in 7 parts:
 - F1(a) Provision of education
 - F1(b) Display of works of art (otherwise than for sale or hire)
 - F1(c) Museums
 - F1(d) Public libraries or public reading rooms
 - F1(e) Public halls or exhibition halls
 - F1(f) Public worship or religious instruction (or in connection with such use)
 - F1(g) Law courts
- F2 Local community – Use as defined in 4 parts:
 - F2(a) Shops (mostly) selling essential goods, including food, where the shop's premises do not exceed 280 square metres and there is no other such facility within 1000 metres
 - F2(b) Halls or meeting places for the principal use of the local community
 - F2(c) Areas or places for outdoor sport or recreation (not involving motorised vehicles or firearms)
 - F2(d) Indoor or outdoor swimming pools or skating rinks.

2.13 The above changes have also resulted in a number of additional uses being added to the schedule of what are considered 'sui generis' uses. Most notably, these include public houses, wine bars or drinking establishments (formerly use class A4), drinking establishments with expanded food provision (also formerly use class A4), hot food takeaways (formerly use class A5). Live music venues, cinemas, concert halls, bingo halls and dancehalls are also now all considered as sui generis uses.

2.14 The introduction of use class E can be considered highly significant not only for town centres but for all retail locations. It means that a commercial unit which was, for example, formerly in class A1 retail use, can now change to a cafe or restaurant use (formerly class A3) without requiring planning permission for change of use, unless a specific restrictive condition applies. This provides town centres and other retail locations with the opportunity to respond more flexibly to changes in demand from different types of uses/operators. However, it is important to note the introduction of class E applies to all locations - i.e. it is not just applicable to town centres. This means there is scope for retail parks and other non-town centre locations to benefit from the additional flexibility afforded by class E, although it is often (but not always) the case that non-town centre retailing is subject to more restrictive historic planning restrictions in terms of ranges of goods which can be lawfully traded.

Permitted Development Rights ('PDR') in town centres

2.15 Also of significance is an amendment which was made to the General Permitted Development (England) Order 2015 ('GPDO') in March 2021 which allows for the change of use from Class E properties to residential from August 2021, known as 'Class MA'. Class MA PDRs came into force on 1st August 2021, and, subject to Prior Approval, allow for the change of use of a building and any land within its curtilage from a use falling within Class E (Commercial, Business and Service) to residential (Use Class C3). Class MA replaces the previous commercial to residential PDRs including Class O (Office to Residential) and Class M (A1 shops and A2

financial and professional services to Residential), which have since expired. A number of exemptions and limitations were applied to the legislation, including requirements for a subject property or building to be vacant for three months prior to any application for prior approval, and a floorspace cap of 1,500sq.m GIA, above which Class MA was not applicable.

- 2.16 These significant provisions were seen to provide wide-ranging opportunities for under-used or vacant town centre and strategic sites following the introduction of class E. The PDR allows for a more streamlined process with greater planning certainty and was intended by Government to support economic recovery, rejuvenate and diversify high streets through better use of vacant premises, and to encourage sustainable use of brownfield sites.
- 2.17 On 14th February 2024, following a public consultation undertaken last year, the Government further loosened the requirements by scrapping the three-month vacancy requirement and the 'cap' of 1,500sq.m for any application for prior approval submitted on or after 5th March 2024. There is now no cap to the floorspace which can be converted under Class MA, and no requirement for the building to be vacant for three months prior to the application being submitted. The intention of removing these restrictions is to allow more under-used Class E buildings to be converted to residential use, in turn providing a boost to the supply of homes. The remainder of the Class MA prior approval requirements and tests will still apply, and the changes will not affect properties that are currently the subject of Article 4 Directions (see below), which prevent the use of buildings for Class MA or where restrictive planning conditions are in place.

Article 4 Directions

- 2.18 Article 4 Directions are a mechanism by which local authorities can remove or restricts one or more permitted development rights from a site or area, meaning planning permission is required. However, the NPPF resists their application, stating at paragraph 53 (NPPF 2021):

'The use of Article 4 directions to remove national permitted development rights should:

a) where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)

b) in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)

c) in all cases, be based on robust evidence, and apply to the smallest geographical area possible. Similarly, planning conditions should not be used to restrict national permitted development rights unless there is clear justification to do so.'

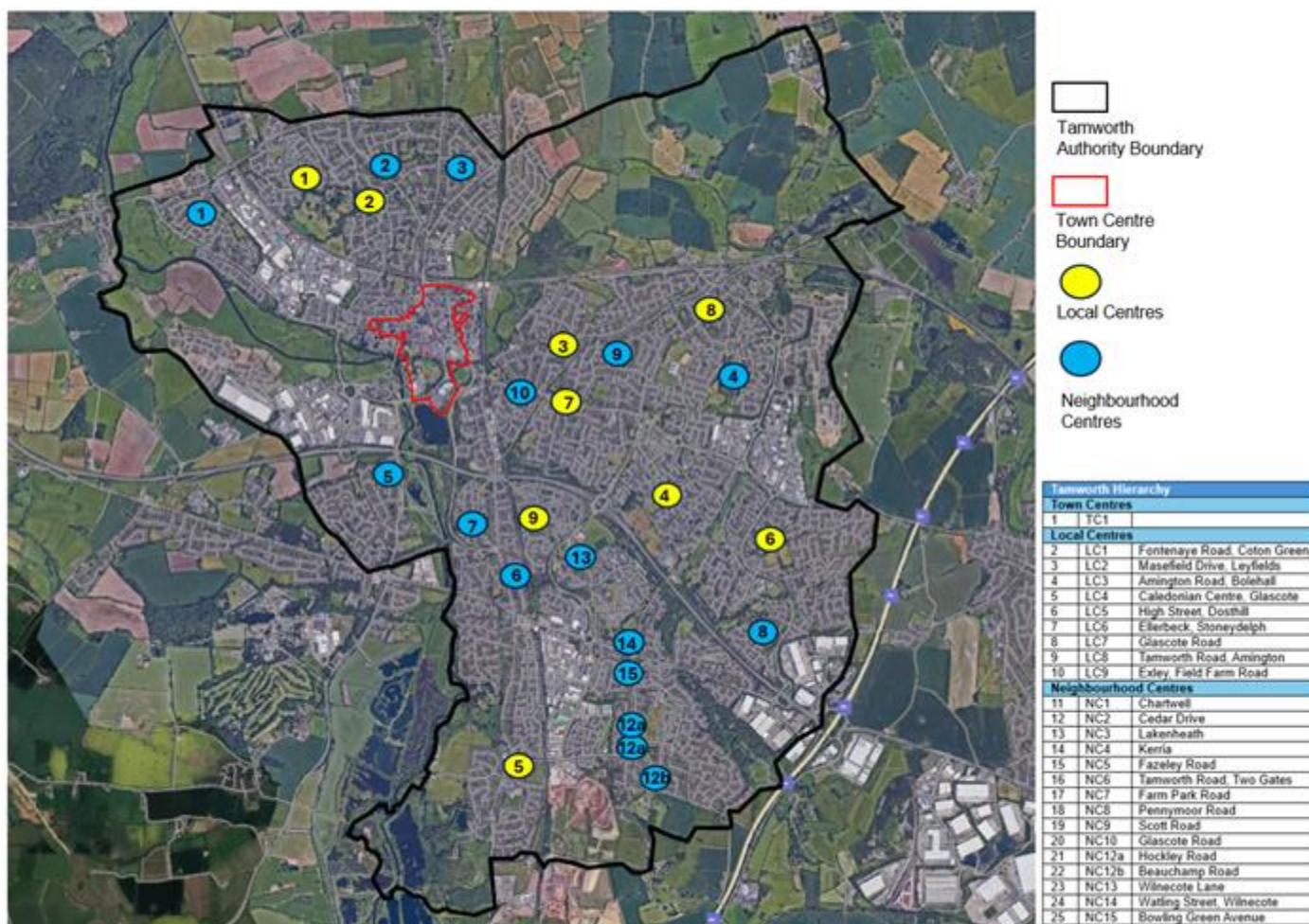
Development Plan

Tamworth Borough Council Local Plan 2006-2031 (2016)

- 2.19 The Tamworth Local Plan 2006–2031 was adopted in February 2016 and provides the statutory Development Plan for Tamworth. The document set out the policies for new development in Tamworth including allocations for new homes and employment land to meet local community and business needs up to 2031.
- 2.20 **Policy EC1** 'Hierarchy of Centres for Town Centres Uses' sets out the Borough's established town, local and neighbourhood centres, as listed below.

- **Main Town Centre** – Tamworth Town Centre which serves the whole of Tamworth and surrounding areas.
- **Local Centres** – there are 9 local centres in total, namely: Fontenaye Road Coton Green, Masefield Drive Leyfields, Amington Road Bolehall, Caledonian Centre Glascote, High Street Dosthill, Ellerbeck Stoneydelph, Glascote Road, Tamworth Road Amington and Exley Field Farm Road.
- **Neighbourhood Centres** – there are 16 neighbourhood centres in total², namely; Chartwell, Cedar Drive, Lakeheath, Kerria, Fazeley Road, Tamworth Road Two Gates, Farm Park Road, Pennymoor Road, Scott Road, Glascote Road, Tinkers Green, Hockley Road, Beauchamp Road, Wilnecote Lane, Watling Street Wilnecote and Bowling Green Avenue.

Figure 2.1 Location of centres within the Borough of Tamworth



Source: Firstplan (based on information from Tamworth Local Plan (2016) Policy EC1). Base map source: Google

2.21 **Policy EC1** states that development comprising a main town centre use or which attracts visiting members of the public is proposed outside of the established centres, must demonstrate:

- Compliance with the sequential test;
- Good accessibility by walking, cycling and public transport;
- That there will be no adverse impact on the vitality and viability of other existing centres;
- That it will not prejudice the delivery of other strategic objectives.

² Subsequent to the adoption of the Local Plan, the Council has undertaken estate regeneration schemes which has resulted in the redevelopment of the neighbourhood centre at Kerria. The neighbourhood centre at Tinkers Green has been removed as part of estate regeneration works at this location.

2.22 **Policy EC1** explains that for main town centre uses proposed outside of the defined hierarchy of centres, an impact assessment will be required accompanying a planning application in line with criteria set out below in **Table 2.1**.

Table 2.1 Impact Assessment Thresholds

Area for Application of Floorspace Thresholds	Impact assessment required for applications over...
Within the out of centre retail parks or Strategic Employment Allocations	Over 250 sq.m gross
Within 400 metres of the boundary of a local centre	Over 250 sq.m gross
Within 400 metres of the boundary of a neighbourhood centre	Over 100 sq.m gross
Any area outside of the town centre	Over 500 sq.m gross

Source: Policy EC1 of the Tamworth Borough Council Local Plan (2016)

2.23 **Policy EC2** ‘Supporting Investment in Tamworth Town Centre’ states that the council will work with businesses and landowners to revitalise the town centre. The Gungate Redevelopment Scheme was set to be completed by 2021 with 20,660sq.m of comparison retail goods floorspace with other uses to be permitted as well as residential uses on upper floors. However, this scheme did not ultimately progress in the form envisaged by the council, as discussed further below.

2.24 **Policy EC2** sets out that *‘development that will have a significant adverse impact on the vitality and viability of the town centre will not be supported unless it has been demonstrated that the wider economic benefits will outweigh the detriment to the town centre. The outdoor street markets should be protected by nearby development and will be enhanced through environmental improvements and promotional activity’*.

2.25 **Policy EC3** ‘Primary and Secondary Frontages’ explains that within the primary frontages area, it is expected that 75 % of the number of units should fall within the A1 (retail) use class³. Within secondary frontages, uses that result in active ground floors or promote the evening economy will be supported.

2.26 **Policy EC4** ‘Supporting Investment in Local and Neighbourhood Centres’ explains that both local and neighbourhood centres offer the potential to be a focus for the regeneration of surrounding communities and proposals which enhance their vitality and viability will be supported. Within local and neighbourhood centres the loss of A1 (retail) uses will only be supported where:

‘a) at least one of the units remaining in the centre acts as a general convenience store

b) the new use is compatible with the retail character of the centre or directly serves the needs of the local community

c) the new use would not undermine the function and vitality of the centre’

2.27 **Policy EC5** ‘Culture and Tourism’ states that the Council will continue to safeguard existing cultural facilities that are serviceable and support the expansion of the Tamworth Assembly Rooms as the centrepiece of the emerging Creative Quarter in Tamworth town centre. The Council will support and work alongside organisations that:

- Support proposals for the provision of a diverse range of cultural facilities, including leisure and conference facilities within Tamworth Town Centre.

³ Use Class A1 has subsequently been replaced by Use Class E.

- Encourage developments which result in additional tourist attractions within Tamworth town centre including a Heritage Centre as well as appropriate infrastructure such as hotel accommodation, public transport, improved walking and cycling routes and facilities, signposting, interpretation and information centres.
- Promote a family focussed evening economy within Tamworth Town Centre by expanding the restaurant and leisure offer.
- Deliver improved physical linkages between the out of centre retail parks, the railway station and leisure facilities to the town centre.

Review of the Tamworth Borough Council Local Plan 2006-2031(2020)

- 2.28 In accordance with regulation 10A of The Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended) which sets out that local planning authorities must review local plans every 5 years from their date of adoption, the Council carried out a review of its Local Plan in 2020. The Review included a detailed assessment of the planning policies in the Plan, providing conclusions which determined whether a policy required updating/replacing, a minor modification, or no change.
- 2.29 In respect of the retail / town centre policies discussed above, the Review identified Policy EC1 as one of seven policies which required change due to not being compliant with updated national planning policy. It was acknowledged that Policy EC1 is in broad compliance with the provisions in the NPPF (2019⁴). However, the policy was considered to not be performing as originally intended as nearly 90% of retail floorspace has been delivered in out of centre locations since the policy was adopted. It was recommended that further evidence base work should be carried out to ascertain the level of retail floorspace / need required.
- 2.30 The analysis of Policy EC2 concluded that it is in broad compliance with the NPPF. The Review noted that the Local Plan did not allocate any sites for specific retail / wider town centre uses, however during the period when the Plan was in the process of being adopted, the Gungate scheme had gained planning permission for 20,660sq.m of retail floorspace. As identified within the assessment of Policy EC2, the planning permission expired in 2020, but the review noted that since then the Council had taken control of the Gungate site and were exploring potential development options.
- 2.31 Following the publication of the 2019 iteration of the NPPF, it is no longer a requirement for primary and secondary frontage areas within defined town centres to be identified. As such, the Review concluded that Policy EC3 is no longer in accordance with updated NPPF and that the policy should be updated to better respond to rapid changes in the retail and leisure industries or should be removed entirely.
- 2.32 Regarding Policy EC4, the Review determined that the policy remains broadly compliant with the NPPF. The analysis identified that local and neighbourhood centres were functioning well as amenity centres with shopping and services provided in each one. It was concluded that it would be beneficial to reassess and map the centres to more accurately reflect the situation on the ground.

Emerging Development Plan

Local Plan 2043 Issues and Options Document (2022)

- 2.33 The Council are in the process of developing a new Local Plan for the Borough, with the first stage of consultation comprising the Issues and Options Document which was carried out in September 2022.
- 2.34 In terms of Tamworth town centre, the consultation document set out that between 2008 and 2019, the annual comparison goods spend has fallen from £117.28 million to £37.2 million, meaning that Tamworth's ranking

⁴ The 2019 iteration of the NPPF was the most recent iteration of the NPPF published at the time of the Council's Review of the Tamworth Borough Local Plan.

compared to other town centres in the UK has fallen from 219 to 782. In addition, the town centre's market share from its primary catchment area decreased from 34% to 12%, whilst Ventura Retail Park's market share has increased from 21% to 58%. Between 2005-2018, annual footfall in the Ankerside Shopping Centre fell from 7.3 million to 4.1 million.

- 2.35 Section 6.4 of the Issues and Options Document focuses on retail, town centre, local and neighbourhood centres. Within the section, it is proposed that the primary shopping area within the town centre should be reduced to the area of Church Street, Colehill, George Street and Market Street. Likewise, it is also proposed that the extent of the defined town centre should also be reduced, removing some of the existing area along Albert Road to the north-east. To the south, the majority of Tamworth Park is proposed to be excluded from the revised town centre area as well as the SnowDome Indoor Snowcentre on Riverdrive. The Odeon Luxe Cinema to the east of Ankerside Shopping Centre is also not included in the revised town centre area.
- 2.36 There are nine local centres, and 16 neighbourhood centres allocated in the adopted Local Plan, and the Issues and Options Document states that all of these will be reviewed to determine if their current status is still appropriate. It is anticipated that the findings and outputs of this study will provide the Council with guidance in respect of this point.
- 2.37 Section 6.4.3 of the Issues and Options Document states that Ventura Retail Park and the adjacent Jolly Sailor Retail Park contain a significant amount of retail floorspace outside the town centre and is also a destination in its own right, drawing visitors in from the wider region. There are also a number of smaller out of centre retail areas in the borough that have the potential to negatively impact on the viability of the town centre. Option 6.4(a) *'the impact of existing retail parks'* provides the following options of how to approach managing the existing retail parks:
- i. *'Give the existing out of centre retail areas their own designation and policies within the plan to mitigate their impact on the town centres.'*
 - ii. *'Rely on national policy and other, more broad, local policies when determining planning applications in the out-of-town retail areas.'*

Existing retail and town centres evidence base

Tamworth Town Centre and Retail Study (2011)

- 2.38 The Tamworth Town Centre and Retail Study was published in July 2011 and forms part of the evidence base for the adopted Tamworth Borough Council Local Plan (2016) in relation to town centre development and retailing policies. The purpose of the study was to analyse the existing retail and leisure provision in Tamworth town centre and in the wider Tamworth Borough⁵.
- 2.39 In terms of capacity for additional convenience and comparison goods shopping in Tamworth, the 2011 Study concluded that there is no capacity for additional convenience floorspace by 2016 whilst there is small capacity in 2026 (2,000 sq.m). It recommends that additional convenience goods floorspace should be directed towards the town centre to improve the range of choice and quality of offer within the town centre and emphasises that the council should be cautious about allowing any further foodstore developments outside the town centre in the short term. The study considered there to be no qualitative need for another large foodstore to improve choice and competition in convenience goods.
- 2.40 For comparison goods, the study found there to be no capacity for additional retail floorspace in 2016 or 2021 but there is capacity in 2026 (11,000 sq.m gross). The study was prepared with full regard to the changes in the proposals for opportunities sites in the town centre such as Gungate. More broadly, it found the retail parks to

⁵ Referred to hereafter in this document as the '2011 Study'

be providing a better quality of shopping provision than the town centre at the time of the preparation of the study.

SECTION 3 | RETAIL & LEISURE CHANGE IN TAMWORTH BOROUGH AND COMPETING CENTRES SINCE 2011 STUDY

3.1 In this section we provide an overview of key developments which have taken place in the Borough's network of centres and other retail locations (i.e. the retail parks) subsequent to the 2011 Study. We also provide an overview of the ongoing developments in Tamworth town centre in relation to the Future High Street Fund and regeneration initiatives.

3.2 Following on from this, we will review key developments which have taken place in surrounding key centres for which Tamworth can be expected to compete for market share for retail and leisure spending; these include Lichfield city centre, Sutton Coldfield town centre and Birmingham.

Changes in Retail Offer Since 2011

Tamworth Town Centre

3.3 Since the 2011 Study, there has not been any significant new retail or leisure floorspace development in the town centre; the biggest change in the retail offer can be considered to have been the closure of the Co-op Department Store in St Editha's Square. The historic premises had been occupied by the Tamworth Co-op Society since the late 19th Century and the building was subject to a three-storey extension in the 1960's to form the department store element which included the sale of clothing, footwear, homeware and children's toys. The store closed in 2021, and the site has now been earmarked for two separate developments by the Council following the securing of investment from the Future High Street Fund (FHSF); the projects are discussed in further detail later in this section.

3.4 More recently, further noteworthy recent store closures in the town centre is the former Boots located in Ankerside Shopping Centre, and the former Wilko store on Market Street. The Boots store closed in March 2024 and occupied one of the largest units within the Ankerside Shopping Centre, whilst Wilko formerly occupied a relatively large unit along Market Street until September 2023 as a result of the national retailer going into administration. The former Wilko unit has been re-let as a sports bar but the former Boots unit remains vacant at the time of preparation of the study.

Elsewhere in Tamworth Borough

Ventura Retail Park and adjacent ('Ventura Retail Warehousing')

3.5 The Ventura Retail Park was originally constructed in 1990 and was identified in the 2011 Study as being a popular destination for comparison goods shopping with a concentration of national fashion retailers. The retail park forms part of a collection of other large-format retail warehouse units and foodstores on the western side of Tamworth which also includes a large Asda supermarket and Marks & Spencer department store to the south of Ventura Retail Park. Directly to west of Ventura Retail Park, the Jolly Sailor Retail Park contains a large Sainsbury's supermarket and further comparison goods retail warehouse units. We refer to these areas of retail warehousing including and adjacent to Ventura Retail Park collectively as 'Ventura Retail Warehousing' in the remainder of this study, as each of the retail warehouse parks and foodstores are accessible at various points from Ventura Park Road.

3.6 Ventura Retail Park has seen a number of changes to its retail offer since the 2011 Study, including:

- The reconfiguration of the western side of Ventura Retail Park (the terrace of units fronting onto Bittescote Drive) which previously housed retailers such as Toys R Us, Mothercare and a large Matalan. Its

remodelling has allowed for the provision of more modern units, which are now occupied by retailers such as Currys, Just for Pets, Superdrug, a relocated Matalan, and most notably, a large Primark store which commenced trading in April 2021.

- The eastern side of Ventura Retail Park has seen Outfit exit a large unit following the administration of Arcadia Group, which has been replaced by a branch of Food Warehouse. The former Next unit has been occupied by Smyths Toys. The former JD unit has been replaced by Go Outdoors.
- Next have, in turn, relocated to a significantly larger unit on the western terrace, also including a home store, in a unit which was occupied by Homebase at the time of the 2011 Study. JD have also relocated to a larger unit on the western terrace.

3.7 A John Lewis at Home store had been trading from Ventura Retail Park since 2011 but closed in 2020, being one of eight John Lewis stores that were closed in that year as the company consolidated its physical network of stores in the wake of the Covid-19 pandemic. In 2021, an application⁶ to subdivide the existing retail was approved to create two separate units in addition to a drive thru unit. The scheme has since been built out, with Aldi and Home Bargains occupying the retail units and Costa Coffee operating the drive thru element.

3.8 As noted above, adjacent to Ventura Retail Park there is also a large, full-line Marks & Spencer department store. This is currently (at the time of preparation of this study) undergoing renovations to provide an expanded fresh market-style food hall, improved bakery and an expanded range of products.

Tame Retail and Trade Park

3.9 Tame Retail and Trade Park is a recently constructed development, having opened in February 2023 and is located approximately 3km to the south-east of Tamworth town centre, adjacent to the Tame Valley Industrial Estate. The scheme gained planning permission in 2021⁷ for a mixed-use development comprising a 2,175 sq.m foodstore, 2,367 sq.m retail store, two class E units totalling 222sq.m, five B1/E(g)(iii), B8 units totalling 1,912 sq.m, a gym and two drive thru units. The mixed use development formed the redevelopment of the former Central England Co-op superstore which closed in 2017. The current occupiers of the recently constructed scheme include Lidl, B&M (B&M Home Store with Garden Centre), Puregym, Subway, Greggs, with the two drive thru units occupied by Starbucks and KFC.

Tamworth Town Centre Investment Projects — Future High Streets Fund

3.10 Tamworth town centre has secured significant investment from the Government's **Future High Streets Fund (FHSF)**. The FHSF is a £675 million Government funding scheme created in 2018 which is aimed at renewing town centres and high streets in a way that drives growth and ensures future sustainability. A total of 72 towns successfully bid for a share of the fund, including Tamworth Borough Council who were awarded £21.65 million in 2020 for projects in Tamworth town centre. A large part of the Council's funding bid centred around enhancing the heritage assets found within the town centre, as well as addressing issues of declining footfall and activity within the town centre. When combined with funding from external partners, the Council have a total of £40 million to invest in scheme to support the improvement and enhancement of Tamworth town centre, and several schemes are currently underway across the town centre which are discussed further below.

⁶ Tamworth Borough Council application ref. 0501/2020

⁷ Tamworth Borough Council application ref. 0069/2020

Figure 3.1 Locations of projects related to the Future High Street Fund within Tamworth town centre



- Project 1 – College Quarter
- Project 2 – Enterprise Hub
- Project 3 – Middle Entry Refurbishment
- Project 4 – Castle Gateway

Project 1 - College Quarter

- 3.11 The **College Quarter** comprises one of four key initiatives associated with the Future High Street Fund and involves the relocation of Tamworth College which forms part of South Staffordshire College to a new building within the town centre. The site comprises the part of the former Co-operative Society Department Store which faces onto St Edith's Square, with the remaining part of the former department store which faces onto Colehill being included within a separate development. The scheme gained planning permission in January 2023⁸ for a new four storey college building which has the capacity for up to 1,500 students. The new facility has the potential for ground floor space to be used for commercially based education in areas such as hair and beauty. Given the site's central location within the town centre, it is anticipated that the scheme will positively contribute to the vitality of the town centre in the long term, particularly as a consequence of the addition of a new student community to the town centre which in turn offers potential to improve levels of daytime footfall. Construction of the scheme is underway, and it is expected that the college will open in 2025.

Project 2 – Enterprise Hub

- 3.12 The Enterprise Hub scheme comprises the redevelopment of the locally listed (ref.025)⁹ part of the Tamworth Co-operative Society Department Store which was originally constructed in 1907. The site gained planning permission in July 2022¹⁰ to refurbish the former department store to provide 15 hybrid office/business units. The purpose of the scheme is to provide flexible working space which supports small businesses and enterprise. Construction of the scheme has commenced.
- 3.13 The 2022 planning permission follows the opening of the Enterprise Centre in 2017, located inside the former Philip Dix Centre on Corporation Street which provides 16 office units to rent for small businesses, as seen below in **Figure 3.2**. The Enterprise Centre format has proved to be successful, operating at full capacity since its opening and the proposed Enterprise Hub will therefore act as a follow-on facility to this. The development

⁸ Tamworth Borough Council application ref. 0262/2022

⁹ Tamworth Borough Council Locally Listed Buildings – Summary (2018)

¹⁰ Tamworth Borough Council application ref. 0236/2022

of the Enterprise Hub will provide larger flexible office spaces for businesses that have outgrown the first enterprise facility, therefore providing two separate facilities that will be able to cater for a variety of enterprises that are based in Tamworth.



New Enterprise Hub under development, Coleshill (September 2024)

Project 3 – Middle Entry Refurbishment

- 3.14 Middle Entry comprises a walk-through pedestrianised shopping precinct in the town centre, with retail units found either side, with the pedestrian route covered by a glazed roof. The scheme provides the principal means of pedestrian access between St Editha's Square and the rest of the primary shopping area to the south, including the Ankerside Shopping Centre.
- 3.15 Refurbishment of Middle Entry is proposed, including demolishing vacant units facing onto Middle Entry/ Market Street to be replaced by a new building that will accommodate independent enterprises. The units which are set to be demolished were formerly occupied by a jeweller, bakery, vape shop and a convenience shop. In October 2022, planning permission¹¹ was gained for the redevelopment scheme which also includes removing the glazed roof and the golden bridges at either end of the Middle Entry, to open up views of St Editha's Church and the Town Hall. Specifically, 9 Middle Entry and 18, 18a and 19 Market Street and 20, 20a and 21 George Street will be demolished to provide a new multi-use building and public realm improvements with the provision of tree planting and benches.
- 3.16 Construction of the scheme is currently in the initial phase, the retail units included within the application site have been demolished.

¹¹ Tamworth Borough Council application ref. 0414/2022



Current retail offer in Middle Entry, showing the glazed roof which will be removed under approved plans.

Project 4 – Castle Gateway

- 3.17 The Castle Gateway project involves creating an improved entrance between the town centre and the Tamworth Castle Grounds by enhancing the Castle Gatehouse area and adjoining Market Street properties. The proposal includes the demolition of 26 Market Street (which was until recently occupied by Nationwide Bank) in order to enable the creation of a wider entrance to the Castle Grounds and Tamworth Park, to better connect these important assets to the wider town centre offer. The existing footbridge between Market Street and the Castle Grounds is narrow and the new walkway will provide better views between the Town Hall located directly to the north along Market Street and the castle grounds to the south. A planning application for the development of the new walkway was submitted in March 2023¹² and granted planning permission in December 2024.

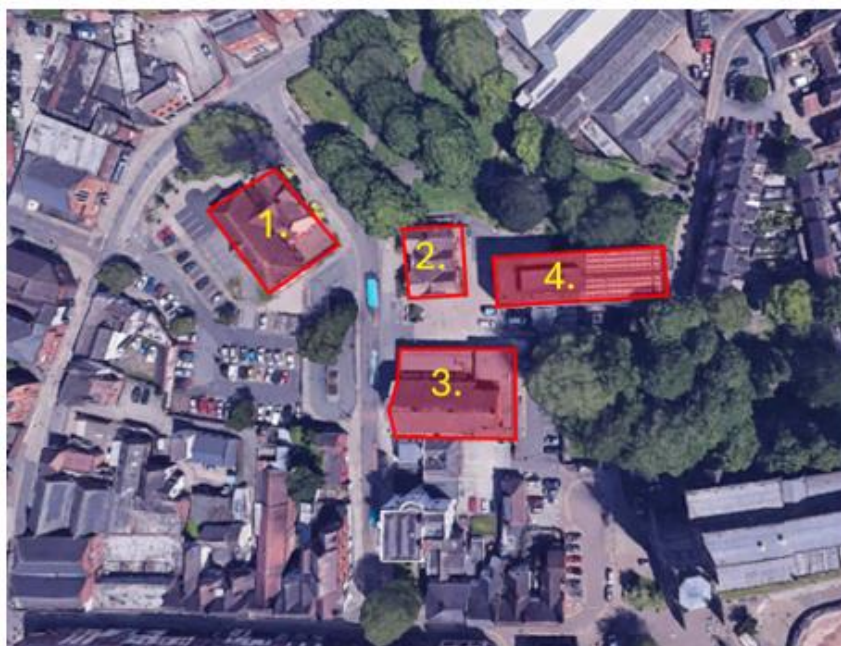
Other Projects in Tamworth Town Centre

Tamworth Enterprise Quarter

- 3.18 A further development that has been constructed in Tamworth town centre in recent years is the creation of the Enterprise Quarter which is located to the west of St Editha's Church. The scheme was driven largely by Staffordshire and Stoke on Trent Local Enterprise Partnership which involved the refurbishment of a collection of listed / locally listed buildings which were underutilised. The separate components include the previously mentioned Philip Dix Centre that became the Enterprise Centre, in addition the locally listed Carnegie Centre which was transformed into a high-end restaurant.

¹² Tamworth Borough Council application ref. 0033/2023

Figure 3.2 Locations of buildings within the Enterprise Quarter



- 1 – Enterprise Centre
- 2 – Carnegie Centre
- 3 – Assembly Rooms
- 4 – Library

3.19 A key aspect of the Enterprise Quarter was the refurbishment of the Assembly Rooms, a Grade II listed 19th century theatre. The purpose of the alterations was to modernise the existing building for future theatre use which included creation of a café bar and exhibition space, a new box office, glazed double doors at the front and a brand new glass extension on the side of the building, which is used as a studio space. The building is now a contemporary entertainment venue, offering a range of theatre productions, live music events, comedy and film screenings. The wider Enterprise Quarter project also included external improvements to the Tamworth Library and the neighbouring public realm.

Castle Grounds and Tamworth Park

3.20 A new playground within Tamworth Park, which is to the south of Tamworth Castle, was delivered in 2022 as the result of a £375,000 investment from Tamworth Borough Council. The scheme which includes a castle themed adventure playground, outdoor gym, table tennis tables, and picnic benches is located on the southern bank of the River Anker and occupies a central position within the park. The modern development replaced a dated playground, with the new scheme providing wheelchair access. From visits to the town centre, the play area is clearly a popular venue for residents and provides scope for linked trips to the wider town centre.

Gungate Quarter

3.21 The Gungate Quarter project comprises the long-term aspiration to redevelop the existing Gungate Car Park and surrounding area that is situated in the eastern section of the primary shopping area within the town centre. In 2010, the site first gained permission¹³ for redevelopment to provide 20,600 sq.m of retail floorspace and 732 car parking spaces. The Gungate Car Park formerly accommodated the 1960s-built Gungate Shopping Precinct, which was demolished in 2010 to make way for the regeneration proposals, however the scheme did not come to fruition and has been used as a car park ever since. An application to replace the extant permission for the regeneration scheme was approved in 2013¹⁴, but again the scheme was not built out. Whilst the site was not allocated within the Tamworth Local Plan (2016), it was identified within the plan that the scheme would meet Tamworth's retail needs in the short term.

¹³ Tamworth Borough Council application ref. 0557/2008

¹⁴ Tamworth Borough Council application ref. 0178/2013

3.22 In February 2017, an application¹⁵ for the provision of 20,660 sq.m of commercial floorspace split across 15 units, was approved for the site. Again, the approved scheme was not built out by private developers and subsequently the council purchased the site in 2018. It is understood that the Council then undertook a public consultation on the outline redevelopment proposals in 2021 but there have been no further updates in respect of any planned schemes for the site subsequent to this. The site therefore remains in use as a surface car park.

Recent developments in competing centres

3.23 In the summary at the outset of this section, we identified that the principal competing locations for comparison goods spend for Tamworth town centre were Lichfield city centre, Sutton Coldfield and Birmingham city centre. Accordingly, in the remainder of this section we summarise the retail and commercial leisure offer in each of these competing locations and, where relevant, planned developments which could potentially impact on the future 'market share' they attract from residents in the survey area we define in **Section 6** (and previous summarised in the introduction in **Section 1**). This is an important consideration as planned future developments may have the potential to alter the 'market share' these centres derive from residents in Tamworth Borough, and in turn it may be necessary to adjust future forecasts for the level of retail and leisure spend which is retained in the Borough.

Lichfield

3.24 Lichfield city centre is located approximately 10km to the north-west of Tamworth town centre and is identified as a 'strategic centre' in the Lichfield Local Plan (2015) and is the district's main retail centre.

3.25 The city centre contains the Three Spires Shopping Centre which contains a number of national retailers including Mountain Warehouse, Trespass, Peacocks and Sports Direct. Other retailers within the centre include B&M, New Look and Waterstones. Whilst Lichfield lacks a large supermarket in the city centre, an Iceland store and Tesco Express are situated within the centre. A Tesco Extra store is situated within the outskirts of city centre to the north whilst a Waitrose supermarket is found to the south of the city centre.

3.26 The city centre does not contain any large department stores but formerly contained a Debenhams store within the Three Spires Shopping Centre until the retailer went into administration in 2021. It is considered that the offer is mid-market, especially in terms of fashion led retail. In regard to the wider Lichfield area, the district does not contain a significant amount of out of centre retail parks. The Imperial Retail Park which opened in 2018¹⁶ is located 1.5km to the north-east of the city centre, accommodating a Lidl, B&M store and a Food Warehouse by Iceland.

3.27 In terms of the wider leisure offer, it is considered that the centre is well provided for with several high-end independent restaurants as well as good number of pubs/bars. In this regard, Lichfield can be considered to have a stronger and more upmarket commercial leisure offer compared to Tamworth town centre, also aided by the historic setting of the city centre including the 13th century Lichfield Cathedral.

3.28 The city centre has been the focus of significant regeneration efforts in recent years, as supported by a Masterplan that was published in 2020. The document sets out four distinctive regeneration quarters which provide the means of targeted investment. The Masterplan also identifies 'Opportunity Sites', including the City Centre Gateway project which involves redevelopment of an area of land to the south of the Three Spires Shopping Centre, to provide a residential led mixed use development for up to 200 homes and 10,000 sq.m of commercial floorspace.

¹⁵ Tamworth Borough Council application ref. 0523/2016

¹⁶ Lichfield District Council application ref. 17/00060/OUTFLM

Former Debenhams Redevelopment

- 3.29 To date, only one part of the Gateway scheme is being constructed which comprises the redevelopment of the former Debenhams store within the Three Spires Shopping Centre. In March 2024¹⁷, planning permission was approved to redevelop the vacant retail unit into a four-screen cinema which is supported by four Class E commercial units as well as another unit that will be used as a restaurant. The cinema will be operated by Everyman, a small cinema operator which provides a more high-end cinema experience with the provision of an in-house bar/restaurant. It was announced in April 2024 that the proposed restaurant will be occupied by national operator The Botanist. The scheme, which is planned to be open by 2026, will improve the already good commercial leisure offer in the centre with high quality, nationally recognised brands and is an indication of Lichfield's affluent socioeconomic status. In conjunction with the scheme, a multistorey car park to the south is proposed to be demolished¹⁸ to make way for a new open-air public plaza.

Sutton Coldfield

- 3.30 Sutton Coldfield town centre is located approximately 11km to the south-west of Tamworth town centre and is designated as a sub-regional centre in accordance with the Birmingham Development Plan (2017). Gracechurch Shopping Centre is located centrally within the town centre which contains a number of mid-range clothing retailers including JD Sports, New Look, Sports Direct and River Island. The shopping centre and the wider town centre is anchored by a House of Fraser department store. The wider town centre contains a Waterstones, TK Maxx, B&M and an Aldi supermarket. In regard to the commercial leisure offer, the centre contains a number of national fast food chains including McDonald's, KFC and Taco Bell whilst also containing several traditional family restaurants such as Nando's, Pizza Express and TGI Fridays.
- 3.31 Birmingham City Council adopted a Masterplan for the regeneration of Sutton Coldfield town centre in May 2021. The Masterplan is focused on diversifying the town centre to provide a broader range of complementary uses. Key proposals include improving the public realm within the 'Restaurant Quarter' along Birmingham Road in the southern portion of the town centre with the provision of more outdoor seating areas. For the Gracechurch Shopping Centre, it is intended to provide a new public square within the existing scheme which will contain new restaurants, cafés and flexible retail space to create a focal point for activity.

Birmingham

- 3.32 Birmingham city centre is located approximately 20km to the south-west of Tamworth and is identified as the highest order centre within the retail hierarchy that is set out in the Birmingham Development Plan (2017), being designated as a 'City Centre'. It is one of the UK's leading shopping destinations.
- 3.33 Being the second largest city in England, Birmingham city centre has a strong comparison goods shopping offer and can be considered a regional shopping destination. The city centre contains several shopping centres including The Square, Mailbox Birmingham, Great Western Arcade, Martineau Place, and the Bullring & Grand Central. A House of Fraser department store is also located centrally within the city centre. The Mailbox provides a high-end offer, containing retail outlets such as Harvey Nichols, James Lakeland and Gieves & Hawkes. The Great Western Arcade is a Grade II listed Victorian style shopping arcade which accommodates a number of independent retailers, including fashion boutiques and beauty salons.
- 3.34 The Bullring provides a more fashion focussed, mid to higher end offer, including brands such as Hugo Boss, Flannels, H&M, Zara and Arket as well as a 32,000 sq.m Selfridges store providing the 'anchor' retail outlet which is one of only three located outside of London. The Bullring & Grand Central have a strong mid-market café and 'family dining' restaurant offer, such as Five Guys, Nando's, Costa Coffee and Café Nero. The Grand Central element of the shopping centre opened in 2015 as part of a wider redevelopment of Birmingham New

¹⁷ Lichfield District Council application ref. 23/01216/COUM

¹⁸ Lichfield District Council application ref. 24/00764/FUL

Street Station. There have been some key changes within the shopping centre in recent years; Marks and Spencer have occupied the former Debenhams store which closed in 2021, whilst the former John Lewis store has gained planning permission in 2023¹⁹ to be redeveloped into a mixed-use scheme with offices, food market, bars and restaurants.

Primark Department Store

- 3.35 A significant development that has occurred since the 2011 Study is the redevelopment of former Pavilions Shopping Centre which has been replaced by Primark clothing store in 2019. The new store is the largest of the retailer's 365 stores across Europe and the United States, standing at 14,873 sq.m and contains a café, beauty salon and a barber shop.

Smithfield (Planned Development)

- 3.36 A major development coming forward is the proposed Smithfield scheme on the site of former wholesale markets, situated adjacent to the Bullring Shopping Centre. The proposal comprises a mixed-use development including 3,000 new dwellings, a 5,585 sq.m dedicated market building along with 1,419 sq.m of flexible retail floorspace. In addition, a new public square is proposed as an events space which has the capacity to accommodate up to 7,000 people. A hybrid application²⁰ for the scheme was deferred at planning committee in May 2024 over concerns of the proposed quantum of open space being insufficient, and it is not known when the application will be decided.

HS2 (Planned Development)

- 3.37 Birmingham is a key element within the HS2 high speed rail network construction project. The new HS2 station will be situated at the eastern edge of the city, construction of the scheme is underway and is expected to operational by 2029. Once completed, the new high-speed line will reduce travel times from Birmingham to London to 49 minutes, improving the connectivity between the two largest cities in England. The new Curzon Street HS2 Station will be integrated with the West Midlands Metro, a tram network which serves central core of Birmingham, connecting to Birmingham New Street Railway Station as the result of an extension to the tram network in 2015.

¹⁹ Birmingham City Council application ref. 2023/00312/PA

²⁰ Birmingham City Council application ref. 2022/09643/PA

SECTION 4 | MARKET CONTEXT

- 4.1 In this section we set out a review of the context within which the findings of this study are being prepared, discussing the market and economic trends which affect retail and leisure spending growth and consumer demand at the time of preparation of this study.
- 4.2 It is important to stress that the analysis set out in this section should be taken as a 'snapshot' of the economic and market conditions prevalent at the time of preparation of this study, in late 2024. Retail and town centres are a sector which is highly susceptible to wider changes in economic circumstances as they are affected by both changes in consumer sentiment (for example when consumers reduce their spending in times of more challenging economic circumstances), and also changes in trends in the commercial market (for example, many operators requiring less physical town centre floorspace because of the growth of online shopping).
- 4.3 Recent years have seen high levels of inflation and associated 'cost of living' concerns which are considered likely to impact on consumer confidence in the short to medium term, in turn impacting on footfall and spend in town centres. The Covid-19 pandemic also proved a pivotal point, as it led to a significant rise in online shopping due to the lockdown and social distancing measures associated with the pandemic. Consumers only have a finite amount of disposable income and in simple terms, the higher the proportion of consumers' spend which is directed online, the less there is available to support spending in town centres.
- 4.4 To inform our analysis, we draw reference to a number of up to date published third party evidence reports from organisations such as ONS, Springboard and Experian, whose Retail Planner Briefing Notes provide insight on consumer spending forecasts over the short, medium and long term. Further details of the household telephone survey are set out in **Section 6** of this report. The most recent Retail Planner Briefing Note ('RPBN') published by Experian was RPBN 21, published in February 2024, which is referred to as 'RP21' in the analysis below and in the remainder of this report.

Sectoral changes since the 2011 Study

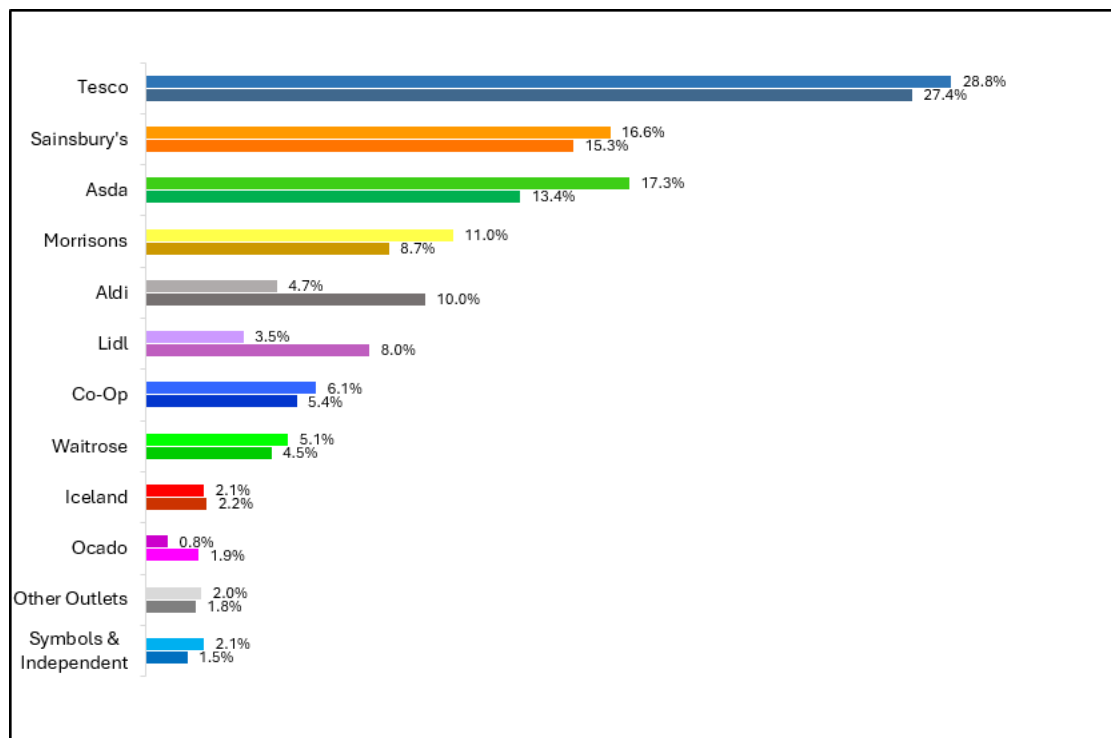
- 4.5 As set out above, the retail and leisure sectors are dynamic and fast-moving, and heavily influenced by external economic factors, particularly prevailing economic conditions which can cause consumers to limit spending and developers and retailers to be more cautious in taking space. There have been a number of significant changes in the sector since the 2011 Study which are discussed below. As identified, the impact of Covid-19 on shopping patterns is also clearly a significant consideration and is considered by way of separate analysis later in this section.

The convenience sector

- 4.6 In the convenience sector, the main trend in recent years has been the continued rise in popularity of the discount retail sector, headed by Aldi and Lidl. The success of these stores has increased significantly over the course of the last decade, with their popularity initially having been boosted during the 2008 financial crisis, but has become particularly amplified in recent years as both companies step up store expansion programmes and claim greater levels of 'market share' at a time when much of the population is becoming increasingly cost-conscious and switching to the use of these stores for at least an element of their shopping. There are currently three Aldi stores and two Lidl stores in Tamworth, as evidence of their recent growth, and we would expect further demand for stores from these operators to potentially come forward in the short to medium term.
- 4.7 Significantly, Aldi has recently overtaken Morrisons to be the UK's fourth largest supermarket in terms of market share, a significant moment given it has broken the long-standing 'big four' dominance of Tesco, Asda, Sainsbury's and Morrisons. Lidl are currently only marginally behind Morrisons in terms of market share, and

Lidl and Aldi combined now have 18%²¹ of the market share in the grocery sector. In addition to securing additional sites for new stores, both companies are also in some cases seeking to enlarge or redevelop existing facilities to provide larger sales area to accommodate the additional numbers of customers which their stores now attract. **Figure 4.1** shows the market share of main grocery retailers at April 2014 and April 2024, showing how the traditional ‘big four’ supermarket operators (Tesco, Sainsbury’s, Asda and Morrisons have all lost market share over the past decade (Asda and Morrisons most significantly), and Aldi and Lidl have both seen market share grow significantly — from 4.7% to 10.0% for Aldi and from 3.5% to 8.0% for Lidl.

Figure 4.1 Grocery market share, comparison between 2014 and 2024 (figures for Great Britain)



Source: Kantar WorldPanel (April 2024). Note: top row within each operator denotes grocery market share at April 2014. Bottom row within each operator denotes grocery market share at April 2024.

- 4.8 Elsewhere within the sector, the traditional ‘big four’ retailers — Asda, Morrisons, Sainsbury’s and Tesco — are not expanding their physical store estates to any significant extent, and the “race for space” which typified retail planning in the first decade of the 2000s has been replaced by an approach which is more orientated towards making existing assets perform more strongly through the introduction of third party retailers and concessions within larger existing stores in retailers’ respective estates.
- 4.9 That said, the ‘big four’ do continue to open new stores where opportunities present themselves, for example aligned to residential urban extensions with new district centres, or major city centre regeneration schemes. Newer stores tend to be smaller in scale than those which were being constructed up until the late 2000s. Sainsbury’s, for example, are trialling a new format of store called a ‘Neighbourhood Hub’, which sits between its larger superstores and small convenience stores in terms of size and have recently opened one of these stores in Desborough, Northamptonshire. Asda are currently rolling out a smaller-format convenience store across the country called Asda Express.
- 4.10 For the most part however, these retailers are focussing on improving the efficiency and offer of their existing stores, introducing enhanced in-store food/dining options or other retailers — for example:

²¹ As of April 2024

- Sainsbury's acquired the catalogue retailer Argos in 2016, and since this time has introduced Argos concessions into most of its larger format stores. In parallel to this, Sainsbury's has closed most town centre or standalone retail park branches of Argos, to reduce the physical store estate and associated rental/lease costs.
- Sainsbury's is also continuing to roll out in-store Starbucks concessions, as well as other retailers such as Specsavers in a select number of stores. However, many of its larger stores which previously operated in-store pharmacies no longer offer this service following the withdrawal of Lloyds Pharmacy.
- Waitrose have introduced a limited range of John Lewis products into a number of their stores and have also collaborated with the upmarket bakery chain Gail's on an in-store concession in Canary Wharf, London.
- Greggs have opened a number of outlets inside Tesco stores, and Tesco has also partnered with other retailers such as Next, and mostly recently launched a trial 'store in store' with the health foods retailer Holland & Barratt.
- Asda have collaborated with a number of third-party brands; a trial with B&Q concessions in a small number of stores has now ended, but it continued to work with other retailers such as Decathlon, who operate a concession within Asda's store in Tamworth.
- Stores have also sought to increase facilities for online delivery and click & collect, in response to increased demand for this during and after the Covid-19 pandemic.

The comparison sector

- 4.11 In terms of comparison goods shopping, the changes affecting town centres have arguably been more pronounced in the past five years than at any time previously. The loss of BHS department stores from town centres at the end of 2016 has been followed by the closure of Debenhams stores, following the company entering administration in both April 2019 and April 2020 and undergoing a number of rounds of store closures between 2018 and the closure of the final round of 118 stores in May 2021. The Arcadia Group, which owned long-established high street retailers such as Topshop, Topman, Dorothy Perkins, Evans and Burton, entered administration in November 2020, with the brands sold to online-only operators such as ASOS and Boohoo Group. This meant that Arcadia's entire portfolio of high street stores was closed.
- 4.12 The most recent high-profile casualty has been the administration of the household goods retailer Wilko (who operated two stores in Tamworth) in August 2023 which resulted in all of the retailer's near-400 stores closing. The closures of Wilko stores have left voids of large retail units in town centres of varying sizes, but in particularly market towns and smaller town and district centres where Wilko stores often performed a significant 'anchor' role. Wilko's brand assets were bought by the discount retailer The Range, who have trialled the re-opening of a small number of town centre stores and have indicated further re-openings may follow.
- 4.13 Other retailers such as House of Fraser and, to a lesser extent John Lewis & Partners, have also reduced their physical store estate. John Lewis operated a homewares-focussed store 'John Lewis at Home' at Ventura Park in Tamworth (which opened in 2011), however closed this following the Covid-19 pandemic along with three other 'At Home' stores and two full-line department stores in Birmingham city centre and in Watford. The Tamworth store has been sub-divided and is now occupied by an Aldi supermarket alongside a large branch of Home Bargains.
- 4.14 Marks & Spencer are continuing with a programme to reprofile their store estate, which has in some cases meant moving out of older units in town and city centres where their stores are less able to trade profitably. In some cases the store has replaced this representation with an out-of-town offer, usually focusing primarily on

food sales, but in some cases a full-line department store offer. M&S have a large, full-line store at Ventura Park in Tamworth which has recently (2024) been the subject of a full internal refurbishment.

- 4.15 Whilst many comparison goods retailers have been downsizing their store portfolios for a number of years, as online shopping has meant there is less of a need for an extensive network of physical retail stores, the closure/downsizing of the operators mentioned in the paragraph above has arguably had the most ‘visible’ impact on affected towns and city centres, as the units occupied are large-format retail spaces, often anchoring a shopping centre or high street, and therefore their vacancy can often be highly prominent. The challenge for town centres is, owing to the changes in shopping patterns and continued uptake of online shopping, in many cases there is a lack of demand from operators wishing to take some or all of the space, and therefore the units are — in many locations — proving difficult to let.
- 4.16 In such instances, landlords and/or shopping centre owners are increasingly looking to ways to diversify the offer in order to let the space, including subdividing the unit into a parcel of smaller units; introducing additional food & beverage, leisure or complementary facilities; or in some cases converting upper levels to offices or even residential uses. It is important to emphasise that these changes were well underway before the Covid-19 pandemic, but the pandemic has undoubtedly served to accelerate the pressure for this diversification to take place.

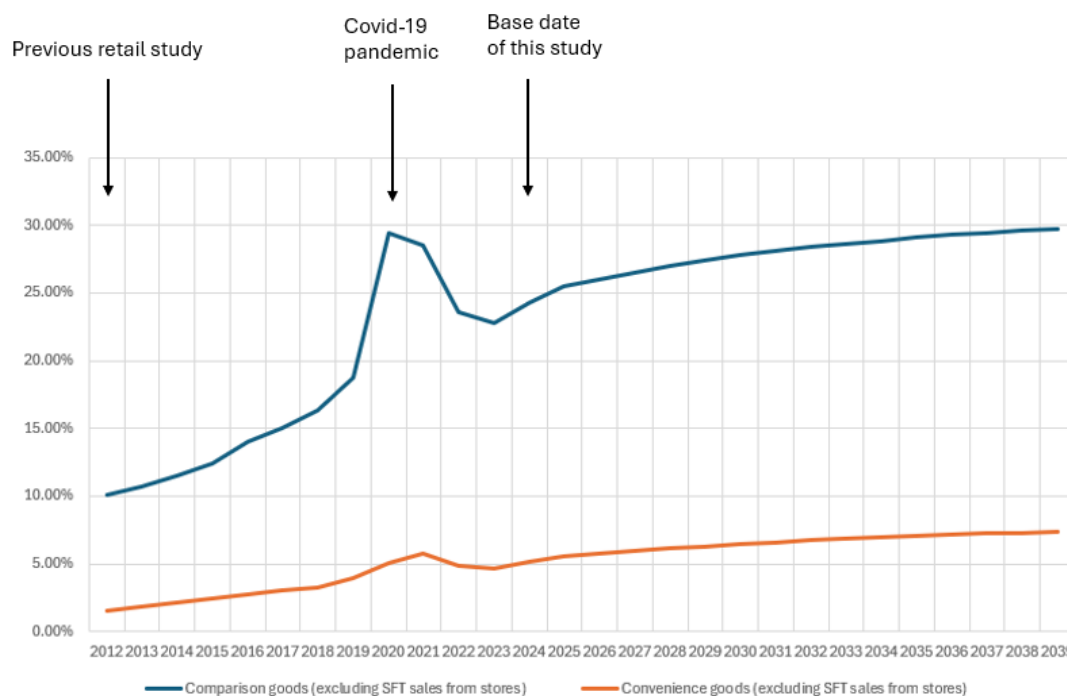
Online shopping and ‘Special Forms of Trading’

- 4.17 ‘Special Forms of Trading’ is a term used to describe all shopping which does not take place within physical retail outlets. It can therefore include spend at markets and other specialist shopping destinations, but the majority of ‘Special Forms of Trading’ (henceforth, SFT) is accounted for by online shopping. Guidance on how much of total available spend is forecast to be accounted for by SFT is published annually by Experian in their Retail Planner Briefing Notes and is also monitored by the Office of National Statistics (ONS).

Comparison goods shopping

- 4.19 It has been widely reported that the Covid-19 pandemic accelerated the influence of online shopping over the shopping patterns of consumers in the UK, significantly amplifying the rates of online shopping which were already taking place, particularly in respect of comparison goods shopping. Such a trend is not surprising given the enforced lockdowns during the first year of the pandemic presented only limited opportunities for physical retail shopping, particularly for non-essential comparison goods shopping such as clothing, footwear and homewares. This can be seen visually in **Figure 4.2**, which shows the growth in comparison goods SFT since the Council’s previous retail study in 2011 and shows the clear ‘spike’ in comparison goods SFT growth around the start of the Covid-19 pandemic in 2019.

Figure 4.2 Comparison and convenience goods SFT 2012 to 2024 and projections to 2039



Source: Experian Retail Planner Briefing Note 21, Figure 5 ('adjusted for SFT sales in stores' figures)

- 4.20 The most recent guidance published by Experian (RP21, February 2024) has regard to this, plus the extent to which patterns of online shopping have 'settled down' after the changes in shopping patterns which the pandemic necessitated. RP21 identifies that SFT currently (2024) accounts for 24.3% of total available comparison goods spend as a UK average and forecast that this will increase to 27.8% by 2030, 29.1% by 2035 and 29.7% by 2039 (Experian do not currently project beyond 2039). At the time of the 2011 Study, SFT for comparison goods was approximately 10.1%, and therefore by the end of the Council's new Local Plan period, UK average SFT will be approximately three times this. This has important implications for levels of quantitative retail need which will need to be planned for.
- 4.21 It is, however, significant to note that the current UK average comparison goods SFT of 24.3% is a reduction from that seen during the Covid-19 pandemic, when comparison goods SFT peaked at 29.4% in 2020 before reducing slightly to 28.5% in 2021. Shopping for comparison goods in this period was influenced by periods of closure of 'non-essential' comparison goods retail stores. The subsequent reduction in comparison goods SFT therefore indicates that some consumers have shifted their spending back to physical retail stores following stores reopening. However, in 2019, the final full year before the pandemic, comparison goods SFT was considerably lower, at 18.8%, and therefore crucially, much of the additional spend which transferred online during the pandemic has not returned to being spent in physical retail stores.
- 4.22 Evidence from the household telephone survey undertaken in support of this study indicates that levels of SFT for comparison goods within the survey area are on average higher than the UK average identified in RP21, albeit not significantly so when compared to comparable studies we have undertaken elsewhere. We adopt these 'local' SFT figures as the basis of our needs assessments; this is discussed further in **Section 7** of this report.

Convenience goods shopping

- 4.23 In respect of convenience goods shopping, there has also been an uptake in the amount of spend which is directed towards SFT. However, the sector continues to account for a significantly lower SFT claim than the comparison goods sector, with the majority of spend continuing to be accounted for by purchases in physical

stores. At the time of the council's last retail study in 2011, SFT accounted for approximately 1.5% of total convenience goods spending as a UK average; the equivalent figure is currently (2024) 5.2% based on guidance in RP21²².

- 4.24 Experian forecast that convenience goods SFT will continue to increase modestly throughout the study period, to 7.4% by 2039 (the latest date to which Experian currently project forecasts). This is also shown in **Figure 4.2**, which clearly shows the year-on-year rate of SFT growth to be relatively limited. Again, **Figure 4.2** shows a bounce in SFT rates during the pandemic, but even during this period SFT only increased to a total of 5.8% of total convenience spend, before settling back to 4.9% in 2022.
- 4.25 The household survey results show there to be considerably higher rates of SFT for convenience goods shopping across the survey area than the current UK averages set out above, with convenience shopping SFT rates approximately double the current UK average across the survey area. Further discussion of this point is provided at **Section 8** of this report.
- 4.26 The SFT rates forecast by Experian are, for both comparison and convenience goods, an important consideration as the higher the proportion of spend which is diverted to SFT/online shopping, the lower the residual spend which is available to support new physical 'bricks and mortar' floorspace. However, it is important to caveat that such forecasts need to carefully be considered 'in the round' alongside updated population projections, information on shopping patterns and so on.

Click & Collect

- 4.27 At the time of the 2011 Study, the 'click & collect' model was very much in its infancy, but nevertheless was already being deployed by retailers including Asda, Tesco and House of Fraser. The click and collect model has since become an established part of consumer behaviour. Research published by Barclays in October 2022 identified the click & collect market to be worth over £42bn in 2022, equivalent to 8.4% of the UK's total retail spending. Click & collect is identified by Barclays as now accounting for 40% of sales for retailers who offer the service, an increase from 37% in 2021.
- 4.28 It also identifies that 41% of physical stores in the UK are used as click & collect locations, with the same amount also used to process returns. This reflects the expansion of the click & collect network in recent years — whereas historically click & collect was undertaken at the local branch of the retailer in question, the expansion by delivery companies and retailers to use partner locations has greatly expanded the store network of click & collect locations.
- 4.29 For example, the courier company Evri now offers click & collect from many branches of Tesco Express, whilst retailers such as IKEA and Amazon have partnered with Co-Op to enhance their click & collect network. Other locations such as Post Offices, local convenience stores and dry cleaners have also taken on an important role as click & collect locations, offering more opportunities for consumers to be able to collect at a time and location convenient for them.
- 4.30 Click & collect also presents potential benefits to wider town centres, as residents using click & collect facilities will assist in driving footfall and potentially linked spending trips, although we are not aware of any recent research which has explored the extent of this relationship. The expansion of click & collect facilities to local and neighbourhood retailers does mean however that there is scope for centres at all levels of a retail hierarchy to potentially benefit from this trend.

²² It is important to note that these figures exclude spending in retail stores, for example when a customer places a grocery order online and when it is picked and delivered from a local branch of the retailer in question, thereby contributing to the turnover of that store.

Patterns of usage of town centres

- 4.31 The analysis set out above has shown that many of the trends seen in recent years have been exacerbated by the Covid-19 pandemic. Spatially, it is also worth noting that more broadly, the main beneficiaries of the pandemic in respect of shopping patterns have been local town centres and locations such as market towns, district and local centres, as — aligned with an increased usage of online shopping channels (as discussed above) — people reduced travelling to 'high order' centres for shopping and directed their spend towards more local shopping facilities.
- 4.32 For example, at the outset of the pandemic in spring 2020, district centres saw a decline in footfall of only 34.5%, compared to 75.9% for city centres. This was due to residents not travelling into city centres for work and/or shopping, but instead working from home — and therefore centres more local to their place of residence benefited from increased footfall as a result.
- 4.33 There has, of course, been a degree of rebalancing of the shifts to homeworking seen at the outset of the pandemic and many office-based companies now seek to offer a 'hybrid' model for employees. Nevertheless, this continues to offer scope for town, district and local centres close to an employees' place of residence to benefit from additional footfall and spend relative to the case prior to the pandemic. Local town centres will potentially need to cater for the needs of significantly larger daytime catchment populations than was the case previously, if increasing numbers of people work from home, even for only some of the week.
- 4.34 On this basis, town centres which are able to provide a comprehensive range of day-to-day shopping and local services — possibly along with workspace / co-working facilities where local residents are able to work away from home or undertake meetings — are likely to continue to retain positive levels of vitality and viability in the medium to long term, therefore.

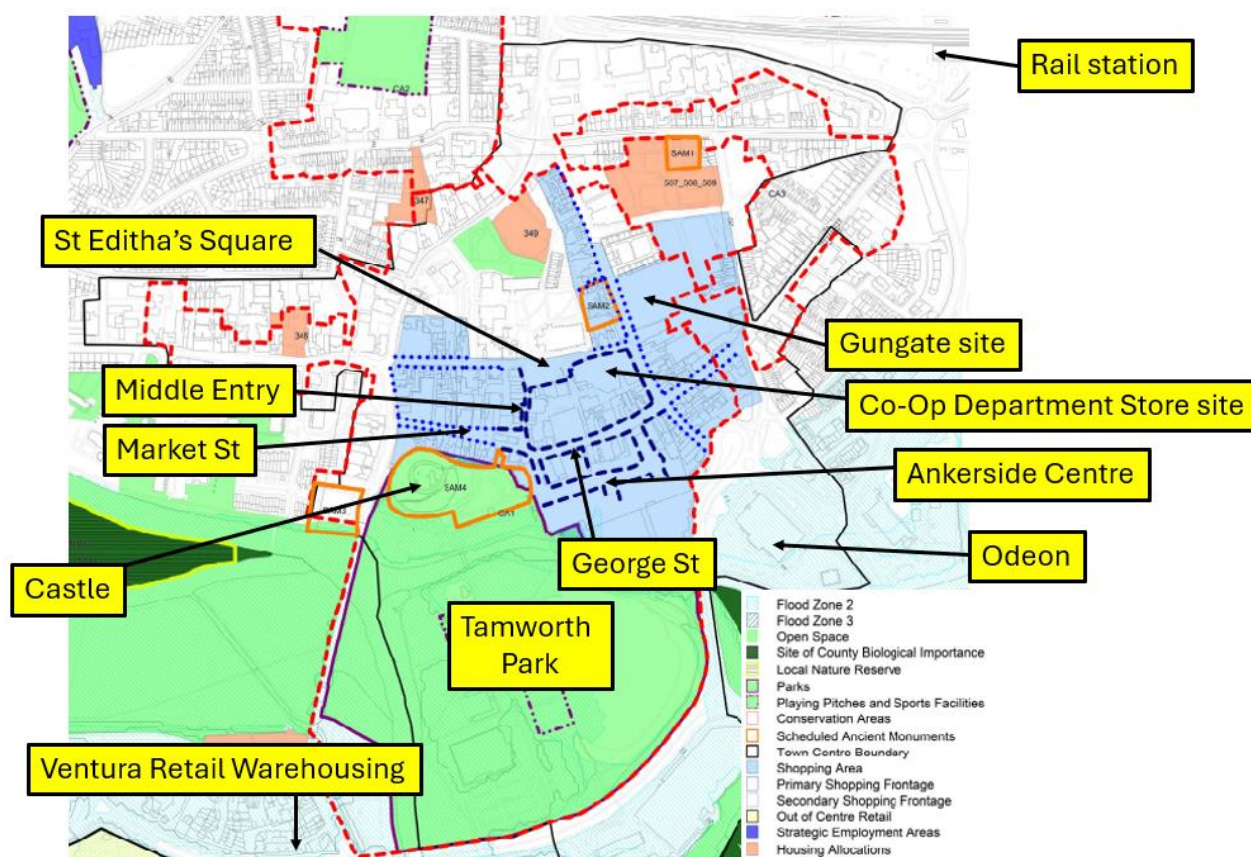
SECTION 5 | TAMWORTH TOWN & LOCAL CENTRE HEALTH CHECK ASSESSMENTS

5.1 In this section, we provide an overview of the role and function, diversity of uses and current levels of vacancy in Tamworth town centre in addition to providing a brief analysis of the other policy-defined centres across the Borough, which takes the form of a network of 'local' and 'neighbourhood' centres (please see **Section 2** for full schedule of these). We have sought to refer to published Experian data on centre diversity where this is available (i.e. Experian Goad's mapping of retail and leisure uses and 'Category Reports' identifying the extent of retail diversity in the centre). However as this information is only available for Tamworth town centre, for the smaller centres in the Borough our assessment is principally based on qualitative observations undertaken through site visits and desktop research, as well as monitoring information provided by Tamworth Borough Council to inform our study.

Performance Assessment of Tamworth (Main Town Centre)

5.2 Tamworth town centre is the highest-order and largest retail centre in Tamworth Borough. The prime shopping pitch is situated along **George Street/ Market Street** which are adjacent to the purpose-built **Ankerside Shopping Centre**. Further frontages include **Middle Entry** to the north which leads onto **St Editha's Square** and Church Street. Colehill also contains several smaller units which accommodate retail/commercial leisure uses. An annotated version of the Local Plan proposals map is set out as **Figure 5.1** to help contextualise the findings of our assessment. Reference should also be had to the mapping of the opportunity sites in the town centre which we have previously set out in **Section 3** of this study.

Figure 5.1 Annotated context plan of Tamworth town centre



Source: base map – Tamworth Borough Council. Annotations in yellow text boxes by Firstplan.

5.3 As can be seen from **Figure 5.1**, Tamworth town centre also benefits from having on its southern side, access to a large open space – **Tamworth Park** – and the associated **Tamworth Castle**. These both represent important assets to the town centre and the Castle can also be expected to perform a tourism role. Enhancements to the connections between the Castle, Tamworth Park and the wider town centre are currently underway, as detailed in Section 3 of this report, and this will help the town centre to capitalise on the benefits these important adjacent assets can bring. The large concentration of retail warehousing at **Ventura Retail Park** and associated developments lies to the south of Tamworth Park, and it is possible to walk between the two retail destinations, although the walk takes about 20 minutes and therefore scope for significant 'linked trips' between the two destinations is considered likely to be fairly limited.



Views of Tamworth town centre / St Editha's Church (left) and Tamworth Park (right) from the Castle grounds

Diversity of Uses

- 5.4 The most recent assessment of the diversity of uses of Tamworth town centre is the Experian Goad survey of the town centre, which was undertaken in January 2024 and therefore represents an up-to-date assessment of the current mix of retail and services uses in the town centre.
- 5.5 A summary of the diversity of uses in the town centre is shown in **Table 5.1**. It shows that the town centre contains 313 commercial units, with retail (comparison and convenience) comprising 126 of these, standing at approximately 40% of the total. Of the 126 units in retail use, 72 (23.0%) of these are occupied by comparison goods retailers, falling a short distance within the UK average of 26.4%. Vacancy rates are discussed separately later in this section.

Table 5.1 Diversity of Uses of Tamworth town centre (Experian Goad, January 2024)

Goods category	Number of outlets	% of total	UK average %	Difference to UK average %
Comparison	72	23.0	26.4	-3.4
Convenience	24	7.6	9.1	-2.5
Retail service	54	17.2	15.9	+1.3
Other retail	0	0.0	0.0	0.0
Leisure services	72	23.0	25.7	-2.7
Financial and business services	33	10.5	8.3	+2.2
Vacant outlets	58	18.5	14.1	+4.4
TOTAL	313	100%	100%	100%

Source: Experian Goad, January 2024. Note Experian Goad boundary may differ from policy boundary. Figures may not add due to rounding

- 5.7 Analysis of the Experian Goad data shows the diversity of uses within the comparison goods sector to be reasonable — but there are a number of gaps in the offer; for example, the centre has no childrenswear retailers, cycle shops or music/entertainment retailers, and only one footwear retailer, and one sports goods store. Such gaps in the offer are not uncommon given the role of online shopping in many of these sectors – but it is clear that the town centre would benefit from more choice across a number of sectors, and, in qualitative terms, would benefit from a more middle-upmarket offer across a number of these as well.
- 5.8 A total of 24 convenience outlets are situated within the town centre, comprising 7.6% of the total number of units which is 2.5 percentage points less than the UK average. Positively, the Experian Goad data confirms that most convenience goods categories are present in the centre — there are eight bakers/confectioners, a butcher, several small convenience stores, two frozen food stores, a grocers, and a health food shop. The centre lacks a fishmonger. The biggest gap in the convenience offer is — as was identified by the 2011 Study — the absence of a larger-format supermarket serving the town centre. Whilst a number of retailers such as Home Bargains and Iceland do provide opportunities for convenience shopping, the absence of a larger-format supermarket is unusual. There are Morrisons, Aldi and Lidl stores around the periphery of the centre — with the Morrisons arguably the most strongly located to the wider town centre offer — but their peripheral nature means it is not considered they are likely to support linked trips with other businesses in the town centre to any significant extent.
- 5.9 **Table 5.1** shows that the joint most common type of use in the town (alongside comparison goods) is leisure services, which accounts for 72 units in the town centre — this category includes cafes, bars, restaurants, cinemas, pubs, gyms and hotels for example. In comparison to the UK average, Tamworth falls within 3 percentage points of the UK average. However, analysis of the Experian data shows there to be considerable duplication in the leisure offer — of the 72 units, there are 15 fast food takeaways and 11 pubs, as well as 16 restaurants, although each of these figures is broadly in line with equivalent UK averages. Whilst the presence of a number of restaurants is positive, the large number of takeaways is less desirable. The 11 pubs are fairly broadly evenly distributed across the centre; this includes two Weatherspoon’s pubs. Of note is the Tamworth Tap, a visually attractive venue which provides a higher end offer within the town centre.
- 5.10 Despite being a key driver of daytime spend and linked trips, particularly as centres diversify away from retail, there are only eight cafes in the centre (2.6% of units), almost half the UK average (5.1%).

- 5.11 Qualitatively, it is considered that the centre would benefit from some more upmarket options across its leisure services categories — encompassing cafes, bars, restaurants and pubs.
- 5.12 Retail services which includes services such as dry cleaners, opticians, health & beauty and travel agents, accounts for total of 54 outlets (23.0%), standing at 1.3 percentage points above the UK average. 38 of the 54 outlets are accounted for by health & beauty services, which includes hairdressing and beauty salons, and these uses represent 12.1% of all uses within the town centre (UK average 11.0%). Other retail services in the centre include seven opticians and two travel agents, a noteworthy qualitative gap in the offer is the absence of any dry cleaners/ laundrettes in the town centre.
- 5.13 In terms of other leisure uses it is worth drawing attention to the following facilities also present within the town centre boundary:
- A 10 screen **Odeon Luxe cinema** is located on the eastern edge of the town centre to the east of the Ankerside Shopping Centre, supported by a dedicated car park. Whilst located within the town centre boundary²³, the cinema is detached from the main retail and leisure offer in the centre by a four-lane dual carriageway (Ankerway), and therefore the cinema does not, in practice, have a particularly functional relationship with the wider centre.
 - The **Snowdome indoor ski centre** is located to the south of Tamworth Park and also contains an ice-skating ring, restaurant and a coffee shop. Whilst more accessible from the centre (via the park), it is also detached somewhat from the wider offer, as is the nearby **Namco Funscape**, an entertainment complex which contains a bowling alley, kids' soft play area, arcade, sports bar and diner and is located in the southern section of Tamworth Park.

Retailer Representation and Balance Between Independent & Multiple stores

- 5.14 The Experian Goad survey of Tamworth town centre (January 2024) identified that 74 out of 313 outlets are operated by national multiple retailers (23%) and for comparison goods national multiple retailers there are a total of 35 units which is 6.4 percentage points higher than the UK average. The presence of national multiple retailers in a centre can be important as they often act as 'anchor stores', drawing visitors to the town centre, driving footfall and supporting linked trips with other town centre businesses.
- 5.15 Tamworth town centre contains a mixture of national multiple and independent retailers, in common with all centres of its size across the country. The town centre does not contain any department stores following the closure of the Co-Op Department Store and does not, as noted above, have any supermarkets centrally-located within the centre. From our site visits to the centre we observed that absence of any supermarket or key comparison goods retailers means that the town centre lacks one or more clear 'anchor' stores around which footfall is orientated. The store which arguably comes closest to fulfilling this role is the large Home Bargains store at the eastern end of Market Street, and it is considered that the Wilko store at the western end of Market Street would also have performed a similar role prior to its closure.
- 5.16 Other national retailers present in the centre include H. Samuel, The Fragrance Shop, Holland & Barrett, Select Fashion and Peacocks, with most of these stores concentrated along Market Street and within the Ankerside Shopping Centre. The town centre also contains a number of national operated discount stores including Savers Health & Beauty, Poundland as well as Home Bargains, and qualitatively there is a fair amount of duplication in the offer of the town centre in this respect. It is understood that ownership of the Ankerside Shopping Centre has recently been transferred to the Council.
- 5.17 Whilst a Costa Coffee is located along both Market Street and within the Odeon Luxe cinema, the town centre lacks the provision of multiple nationally operated coffee chains as well as lacking the presence of both national fast food and dine in restaurants (e.g. Pizza Express, McDonalds, and similar) which are usually found in larger

²³ Based on adopted Local Plan (2016) proposals map

town centres. As previously identified, the convenience offer is also relatively limited; alongside the Iceland store previously mentioned there is also a Co-op store located within the northwestern section of the primary shopping area along Church Street and a Farmfoods store located within Middle Entry.



Home Bargains store and adjacent coffee shop on Market Street

- 5.18 It is considered that overall quality/pitch of the retail offer within Tamworth town centre is towards the lower end of the market; many of the retailers are value-orientated, and this view could arguably also be extended to the food and beverage offer in the town centre as well. In terms of national operators, it is noticeable that many of the retailers which sit more towards the middle of the market in terms of price/quality are instead represented at Ventura Retail Park and adjacent sites – e.g. Next, H&M, M&S and JD.
- 5.19 Whilst the town centre is well provided for in terms of nationally recognised retail outlets, the town centre does have a healthy independent retailer offer. Independent clothing retailers such as The Wardrobe and Atrium Menswear play an important role in diversifying the offer within the town centre that lacks a significant number of fashion retailers. The pedestrianised section of the town centre including Market Street/George Street and St Editha's Square contain market stalls which operate on Tuesday and Saturday every week. The market stalls sell a range of products including clothes, homeware, electronic products including vapes and fresh produce. There is also a broad range of specialist retailers including jewellers, butchers and florists. Tamworth also boasts a diverse range of independent restaurants that are located across the town centre.

Vacant Units

- 5.20 Tamworth, like many town centres, is faced with the wider challenge of containing a relatively large amount of property stock which may ultimately be in excess of what is currently required by the local market in light of changes in consumer behaviour and the continued move towards online shopping, as our analysis in the preceding section has set out.
- 5.21 The Experian Goad survey of the town centre (January 2024) identified a vacancy rate of 18.5% which is higher than the UK average of 14.1% and this vacancy rate has increased since the 2011 Study by 4.5 percentage points. It is important to caveat that the largest vacant unit identified in the Experian Goad survey comprises the former Co-op department store which is, as we have identified previously, currently being redeveloped into a college/ flexible office space for small businesses. Notwithstanding this, however, the vacancy rate is clearly

high and, in our view, represents a cause for concern. Upon visiting the town centre in July 2024, the following units identified as being recently vacant by the Experian Goad survey in January 2024, have now been let:

- **2-3 Market Street** was formerly occupied by Wilko which went into administration in 2023 is now operates a sports lounge/bar, offering a range of activities such as pool, snooker and darts. The unit comprises one of the largest outlets within the town centre and provision of leisure activities will contribute to the overall commercial leisure offer for the wider town centre.
- **9 Colehill** was a former Co-operative bank which closed in 2018 and is now occupied by Nuvo Medispa skin care clinic.
- **6b Colehill** is a small commercial unit that is now occupied by a barbershop.
- **Unit 49 Ankerside Shopping Centre** was formerly vacant and is now occupied by men's fashion retailer Atrium Menswear.
- **Unit 5 Ankerside Shopping Centre** was formerly vacant and is now occupied by The Creative Hub which is an arts & crafts retailer.
- **3 Mill Lane** was occupied by Dreams mattress store but became vacant in 2020, the large unit operates as a veterinary practise.

5.22 A number of stores that were identified as being occupied at the time of the Experian Goad survey are now vacant, including the following:

- **Units 18-24 Ankerside Shopping Centre** was formerly occupied by Boots but became vacant in March 2024.
- **Unit 34 Ankerside Shopping Centre** was formerly occupied by o2 (mobile phone shop) but is now vacant.
- **Unit 46 Ankerside Shopping Centre** was formerly occupied by Ponden Home Interiors but is now vacant.

5.23 The town centre has therefore lost three national retailers in recent months, and the Boots unit in particular is a large and visually prominent unit in the town centre (see image below). The re-letting of the Wilko unit is positive, although is largely a replication of businesses already present elsewhere in the town centre. It is recommended the vacancy rate is carefully monitored by the Council moving forwards; however, the regeneration schemes which are currently coming forward in the town centre will deliver an uplift to its overall vitality, which could in turn attract new businesses and operators to the centre.



Large vacant unit (former Boots) in Ankerside Shopping Centre

Pedestrian Flows

- 5.24 From our visits to the town centre we observed levels of pedestrian activity to generally be strong, particularly along the prime shopping pitch of Market Street, George Street and the intersection between Colehill, Victoria Road and Bolebridge Street as the result of being a key point of access to the pedestrianised section of the primary shopping area. Within the Ankerside Shopping Centre, relatively high levels of footfall were observed throughout and benefits from having two entrances along Market Street as well as entrance facing onto the castle grounds — although it was noted that many of the retail units within the centre were quiet. We also visited the town centre on the market day which attracted high levels of footfall; the stalls were predominantly located in the aforementioned prime shopping pitch.
- 5.25 Tamworth Castle and the surrounding grounds also sees high levels of footfall, with the pedestrian bridge leading on Market Street to the north being the principal point of access. Heading northwards, the Middle Entry walkway was observed to have high levels of footfall, connecting to St Editha's Square to the north. Whilst St Editha's Square has a collection of shops and market stalls, it is apparent that a mobile food vendor known as 'Spud Man' which has a large social media following, is driving footfall in this area of the town centre, with long queues for the vendor seen throughout the day at the time of our visit.
- 5.26 Notwithstanding that both the Castle Grounds and the wider adjacent Tamworth Park include signposts providing directions to Ventura Retail Park to the south, it is considered that the provision of markings on existing walkways would be beneficial to make the route clearer. Whilst the Castle Grounds and Tamworth Park was observed to be busy, it was observed that there was a lack of pedestrian activity leading to Ventura Retail Park further to the south and the route itself is slightly convoluted. We consider that the scope for significant number of linked trips to take place between the retail park and the town centre to be relatively limited.
- 5.27 Secondary areas within the centre away from the main shopping streets were observed to be quieter. The western end of Church Street in addition to Lichfield Street to the west was observed to be quiet and is likely the consequence of the retail/wider offer in this part of the centre being comparatively limited. Likewise, the northern section of Lower Gungate was observed to have lower levels of footfall, in addition to Spinning School Lane as a consequence of high levels of vacancy in the particular locality. It was also noted that the western end of Market Street appears to be suffering from relatively low levels of footfall and feel more 'down at heel' than many other parts of the centre; the closure of Wilko at the western end of the street appears to have negatively impacted footfall quite considerably and there are a number of vacant units along this stretch.

Customers and residents' views & behaviours

5.28 As part of the household telephone survey, which was undertaken in support of this study, residents were asked a number of questions relating to their usage of the town centre, their likes and dislikes of the centre, and how they felt the centre could be improved. Some key findings from this analysis are presented in **Table 5.2**.

Table 5.2 Summary of key findings of residents' views and behaviour in Tamworth town centre

Question	Top 5 responses from household survey	Firstplan comments
"When did you last visit Tamworth town centre?"	<p>Within the last week = 25.6%</p> <p>Longer than twelve months ago = 25.5%</p> <p>Within the last month = 8.3%</p> <p>Never visited = 7.8%</p> <p>Within the last two weeks = 7.7%</p>	Over one quarter of respondents stayed they visited within the last week. When added to those who have visited within the last two weeks, that means that over 33% of respondents visit at least every two weeks which is reasonably positive. However, it is considered with a broader range of facilities, higher levels of frequent visits can be achieved, and therefore this should be a key metric which is monitored over future years.
"How long do you normally spend in Tamworth town centre when you visit?"	<p>51-60 minutes = 28.6%</p> <p>91-120 minutes = 19.4%</p> <p>21-30 minutes = 15.3%</p> <p>61 to 90 minutes = 10.0%</p> <p>Over 120 minutes = 7.7%</p> <p>(note = 25.0% said visit for under 30 minutes)</p>	Overall, 57.5% of respondents stay in the town centre for under an hour, and 25.0% stay for under 30 minutes. A key target should be to improve these dwell times with growth in visitors in the 60-120 minutes brackets. A broader retail and leisure offer would assist with this.
"What is the main purpose of your visit to Tamworth town centre?"	<p>Non-food shopping = 26.2%</p> <p>Services (banks etc) = 20.6%</p> <p>Food shopping = 8.8%</p> <p>Daytime leisure = 8.5%</p> <p>Window shopping = 7.3%</p>	Non-food shopping is a key driver of footfall in the town centre despite some limitations to this offer, as this analysis has identified. The figure for "daytime leisure" (i.e. visiting cafes) is considered low; the low percentage for food shopping reflects the relative lack of these facilities within the town centre, at least in terms of main food shopping.
"When you visit Tamworth town centre, what other activities or services do you use?"	<p>No other activities = 36.3%</p> <p>Non-food shopping = 17.9%</p> <p>Daytime leisure = 16.2%</p> <p>Food shopping = 9.8%</p> <p>Evening leisure = 7.9%</p>	Over one-third of respondents do not undertake any 'linked trips', meaning they come into the town centre for one sole activity. Increasing the proportion of respondents who undertake

Question	Top 5 responses from household survey	Firstplan comments
		linked trips activities will also help improve dwell time in the centre. It is noted that “daytime leisure” performs slightly stronger as a linked trip activity but there is scope for further improvement in this in our view.
“Which of the following statements most closely reflects your use of the market in Tamworth town centre?”	<p>I never visit the market = 60.7%</p> <p>I visit the market but less often than once or twice a month = 15.1%</p> <p>I visit the market once or twice a month = 9.5%</p> <p>I visit the market once or twice a fortnight = 3.3%</p> <p>I visit the market every Tuesday (but not Saturday) = 2.9%</p>	Levels of patronage to the market were perhaps lower in the survey than we expected given the apparent popularity of the market when visiting the centre, and it appears most visitors who do use the market use it relatively infrequently. In total, only 10.3% of respondents stated they visit the market at least once a fortnight.
“What do you like about Tamworth town centre?”	<p>Attractive setting = 10.3%</p> <p>Familiarity = 10.1%</p> <p>Castle grounds / historic qualities = 7.7%</p> <p>Nice atmosphere/friendly = 7.3%</p> <p>Close to home = 6.7%</p> <p>Open / green spaces / parks = 4.7%</p> <p>Good cafes/ restaurants = 4.6%</p>	Responses relating to the positive environmental quality of the centre generally score highly – e.g. the attractive setting, castle grounds, open spaces etc – which reflect some of the key unique assets of the town centre. Responses relating to the retail and leisure offer of the town centre attracted low response rates.
“What do you dislike about Tamworth town centre?”	<p>Too many empty shops = 24.6%</p> <p>Better clothes shops needed = 8.4%</p> <p>More national retailers = 7.2%</p> <p>Better range of non-food shops = 7.2%</p> <p>Too many charity shops = 7.0%</p> <p>Poor environment = 6.0%</p>	Nearly one quarter of all respondents identified the high number of vacant units as their main dislike in the town centre. Three of the remaining top five responses all related to what respondents considered to be weaknesses in the retail offer of the town centre.
“Thinking about how Tamworth Town Centre may look in the future, how do you think it may need to change so that it’s successful?”	<p>More “high street” retailers = 17.4%</p> <p>More / better range of non-food shops = 16.7%</p> <p>More independent shops = 12.4%</p>	Again, the main responses to this question were overwhelmingly related to improving the range and quality of the retail offer, both through the attraction of more national retailers and more

Question	Top 5 responses from household survey	Firstplan comments
	More / better clothes shops = 11.4% Less empty shops = 9.7%	independent retailers to the centre.

Source: household survey results

Accessibility

5.29 Tamworth benefits from containing a railway station located adjacent to the north-eastern boundary of the town centre. Tamworth is served by hourly services to London Euston via Stafford, Nuneaton, Rugby and Milton Keynes Central (London NorthWestern); as well as services approximately every 30 minutes to Birmingham New Street, Derby and Nottingham, with one service per hour extending to Cardiff, Cheltenham and Gloucester (CrossCountry). Longer distance CrossCountry and Avanti West Coast services also serve the station on a more infrequent basis.

5.30 The centre is also served by an extensive bus network, with several routes serving the Victoria Road Bus Interchange (4,7,7A,7E,15 and 5). **Table 5.3** summarises current service provisions, correct as of August 2024.

Table 5.3 Bus services connecting to Tamworth town centre (Services with hourly frequency or greater shown)

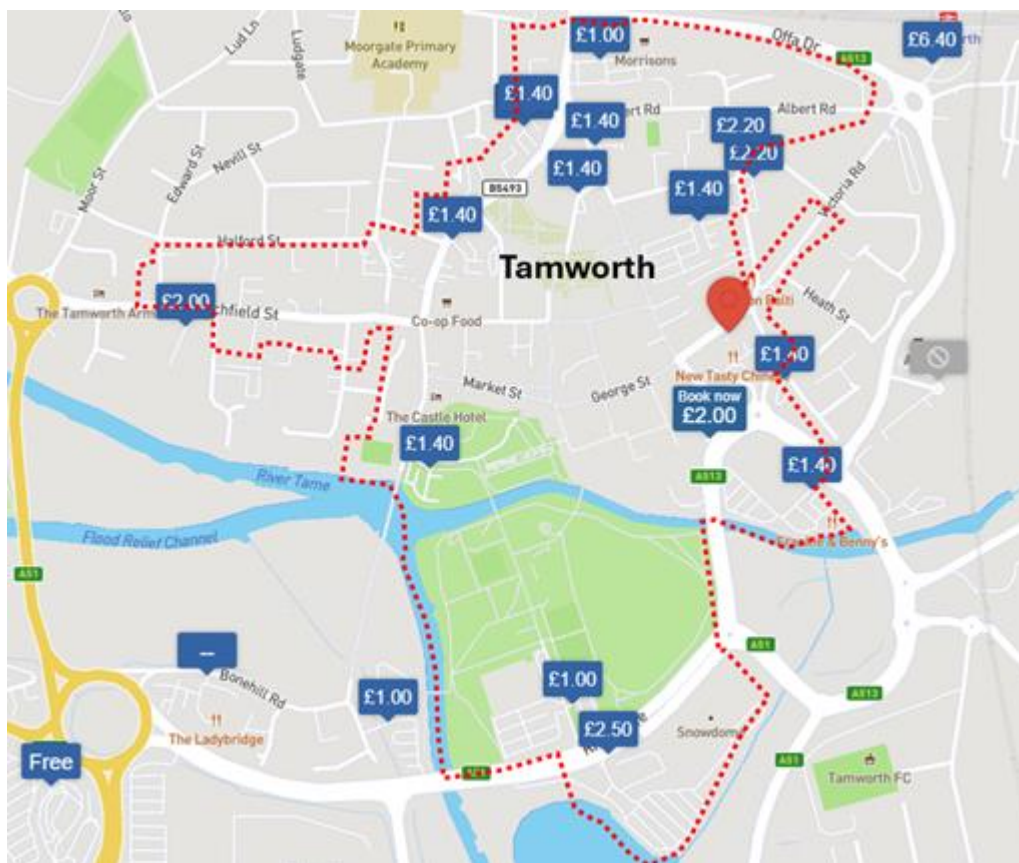
Route	Start	Terminus	Via	Typical daytime frequency – every x minutes
DAYTIME ROUTES				
2	Tamworth	Perry Crofts Circular	Tamworth Railway Station	30
2	Tamworth	Tamworth (Loop)	Ventura Park	30
3	Tamworth	Coton Green	Leyfields and Gillway	30
4	Tamworth	Trojan	Glascote	15
5	Tamworth	Troon	Bole Hall and Glascote Heath	15
7	Tamworth	Stoneydelph	Glascote and Glascote Heath	15
8	Tamworth	Torrige	Belgrave, Wilnecote and Hockley	15
11	Tamworth	Dunstall Park	The Leys and Ventura Park	30
20	Tamworth	Mercia Park J11/M42	Tamworth train station, Perry Crofts, Seckington and No Man's Heath	50
65	Tamworth	Nuneaton	Stonedelph, Polesworth, Dordon, Grendon, Atherstone and Higham-on-the-Hill	60
66	Tamworth	Birch Coppice	Dordon	60
76	Tamworth	Sutton Coldfield	Ventura Park, Dosthill, Kingsbury, Water Orton, Curdworth and Reddicap Heath	60
110	Tamworth	Birmingham	Fazeley, Mile Oak, Roughley, Sutton Coldfield, Yenton and Erdington	15-20

784	Tamworth	Nuneaton	Stoneydelph, Dordon, Grendon and Atherstone	60
765	Tamworth	Lichfield	Botany Way and Whittington	60
766	Tamworth	Nuneaton	Atherstone and Hartshill	60
X65	Tamworth	Litchfield	Botany Bay	60
X66	Tamworth	Lichfield Bus Station	Hopwas	50
NIGHT BUSES				
7E	Tamworth	Tutehill	Glascote	60

Source: Firstplan desktop research, correct as of August 2024

5.31 Tamworth town centre is also highly accessible for those wishing to travel by car, with good connections to the strategic road network; a junction to the A5 which later connects to the M42 is found c. 800m to the south of the town centre. Upper Gungate / Saxon Drive (A513) provides connections to the northern side of the town centre which allows convenient access to Victoria Road, Marmion Street and Aldergate where car parks are located and via Tame Drive / River Drive / Anker Drive / Peelers Way from the southern side of the town centre providing easy access to Ankerside Shopping Centre and the Odeon cinema complex. The town centre benefits from the provision of several car parks, as listed below and illustrated in **Figure 5.2**.

Figure 5.2 Car parking provision in and around Tamworth town centre



Source: Parkopedia website, accessed August 2024

- The largest car park in the centre is the **Ankerside Shopping Centre car park**, containing 700 spaces and costs £2 for a 2-hour stay.
- **Morrisons car park** located on the northern side of the town centre accessed by Upper Gungate contains 117 spaces and costs £1 for a 2-hour stay.

- A further four car parks offer limited parking for two hours only, located on the northern and northwestern section of the centre which include Hospital Street car park with 17 spaces / Hospital Street 2 car park with 51 spaces, Lower Gungate car park with 32 spaces, Church Lane car park with 48 spaces and Aldergate car park with 56 spaces. Parking at each of these costs £1.40 for a 2-hour stay.
- **Tamworth Railway Station** car park, located on the north-eastern side of the centre, contains 329 spaces and costs £6.40 for a 2-hour stay.
- **Marmion Street** (88 spaces) and Albion Street car park (39 spaces) are both located on the north-eastern side of the town centre and cost £2.20 for a 2-hour stay.
- **Spinning School Lane** car park (146 spaces) and Gungate car park (249 spaces) provide further provision in the town centre and cost £1.40 for a 2-hour stay.
- A smaller car park with 37 spaces located on **Mill Lane** off Anker Drive and Bolebridge Street (A513) near the Bus Interchange costs £1.40 for a 2-hour stay.
- **Bolebridge Island** car park has 205 spaces and serves the Odeon cinema and adjacent outlets, and costs £1.40 for a 2-hour stay.
- **Moat House** car park is located on the western side of the town centre, containing 100 spaces and costs £2 for a 2-hour stay.
- **Holloway** car park is located on southern side of the town centre and is well placed for visitors to Tamworth Castle. It contains 74 spaces and costs £1.40 for a 2-hour stay.
- **Jolly Sailor** car park with 158 spaces is located west of River Tame and **Riverdrive** car park with 110 spaces is located east of the River Tame. Both are accessed by Riverdrive (A51) and both cost £1 for a 2-hour stay.
- **SnowDome and Holliday Inn** car park, located on the southern side of the town centre adjacent to Borrowpit Lake, contains 500 spaces and costs £2.50 for a 2-hour stay.

Perception of Safety and Occurrence of Crime

5.32 In reference to data published by Staffordshire Police and as shown in **Table 5.4** between January and June 2024, the number of offences that were recorded ranged from 48 in February to 87 in April. At the time of our visit (weekday daytime), Tamworth town centre was observed to have a safe and pleasant environment. No observations of antisocial behaviour were identified, and nor was there evidence of significant graffiti, criminal damage or similar in the centre. We therefore do not consider there to be any particular concerns in respect of the vitality and viability of the town centre against this indicator.

Table 5.4 Crime statistics for Tamworth town centre January 2024 – June 2024

Tamworth	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Total
Antisocial Behaviour	2	5	7	4	4	2	24
Burglary	2	4	1	9	3	1	20
Criminal Damage and Arson	11	1	4	6	1	7	30
Drugs	2	2	2	1	0	2	9
Possession of Weapon	1	0	0	0	1	1	3
Public Order	4	5	6	8	6	10	39
Shoplifting	7	5	11	12	8	2	45

Tamworth	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Total
Theft	5	2	6	3	7	5	28
Bicycle Theft	3	0	1	0	2	1	7
Vehicle Crime	1	3	5	3	7	6	25
Violence and Sexual Offences	19	19	19	31	16	26	130
other crime	3	2	4	10	7	6	32
Total	60	48	66	87	62	69	392

Source: Staffordshire Police, data for January-June 2024. Source: <https://www.police.uk/your-area/staffordshire-police/tamworth-town/?tab=CrimeMap>

Town Centre Environment Quality

5.33 Tamworth can be characterised as having a generally positive environmental quality, predominantly as the result of the historic nature of much of the town centre which features Victorian-era architecture. As seen in **Figure 5.3**, the town centre contains a large collection of listed buildings as well as four scheduled ancient monuments. In particular, the Grade I listed Tamworth Castle and St Editha’s Church are key contributors to the visual appearance of the town centre.

Figure 5.3 Heritage assets in Tamworth town centre



5.34 Both of these heritage assets are located in proximity to town centre regeneration projects related to the Future High Streets Fund; a new pedestrian bridge will be provided adjacent to Tamworth Castle whilst both the new Enterprise Hub and Tamworth College will be delivered adjacent to St Editha’s Square which overlooks the

Grade I listed church. Such developments will enhance the vitality of the aforementioned key assets within the town centre. The wider castle grounds are well maintained with an extensive landscaping scheme which also contributes to the visual attractiveness of the town centre.

5.35 The town centre also accommodates a number of Conservation Areas including the Tamworth Town Centre Conservation Area which covers the majority of the town centre, as shown in **Figure 5.4**. The Conservation Area was originally designated in 1976 and is based around the historic core of the town and the throughfares into Tamworth, including Lichfield Street, Aldergate, Gungate and Holloway. Towards the northern section of the town centre the Victorian Road/ Albert Road Conservation Area is situated. This area is broadly characterised by its Victorian architecture.

5.36 Despite the wealth of heritage assets within the town centre, there is a mixture of architectural styles including mid-20th century concrete developments such as the parade of shops lining St Editha's Square. The square itself is dominated by paving which creates a slightly austere environment, whilst the Middle Entry renovation will improve the quality of public realm on the southern side of Middle Entry but will not benefit the wider St Editha's Square. Positively however, an application for public realm improvement works in St Editha's Square was approved in October 2024²⁴. The approved scheme includes a new paving scheme, tree planting, installation of benches and enhancement of the Colin Grazier War Memorial. The scheme is being funded as part of the wider £21 million Future High Street Fund that has been secured by Tamworth Borough Council. The purpose of the improvement works is to create a more visually attractive multi-purpose space that will compliment the new college currently under construction that faces onto St Editha's Square.

Figure 5.4 Conservation Areas within Tamworth town centre



²⁴ Tamworth Borough Council application ref 0032/2023



The public realm in St Editha's Square, which feels open and exposed and may have scope for enhancement

5.37 The historic setting of the town centre is impacted somewhat in some areas due to buildings being in a poor state. Specifically, the rear of Nationwide Bank located adjacent to the castle grounds pedestrian walkway is in state of disrepair, however this unit is set to be demolished to make way for a new pedestrian walkway as part of the Castle Gateway project. A collection of units located along the western section of Church Street detract from the overall high visual quality of the town centre, although these units are situated in the extremity of the primary shopping area and their poor appearance is not considered to impact the vitality of the wider town centre.



Planting and clear visual wayfinding makes a positive first impression when arriving in the town centre from the railway station



Shopfront making a positive contribution to the street scene on Market Street. The attractive architecture which typifies large parts of the town centre can also be seen.

5.38 Tamworth is subject to a number of regeneration projects related to Tamworth Council securing funding from the Future High Streets Fund. Key schemes such as the redevelopment of the former Co-op Department Store to provide both the Enterprise Hub (flexible office space for small businesses) and a new college accommodating up to 1500 students, will contribute to the long-term vitality of the town centre by maintaining consistent levels of footfall within the town centre during weekdays. Further details of these are provided in **Section 3** of this report.

Conclusions on Tamworth town centre

5.39 Overall, we consider Tamworth town centre to be displaying adequate levels of vitality and viability, but there are improvements needed to diversify its offer in two ways — firstly, reducing the duplication in the current offer which exists, and secondly, by improving the quality of both the retail and the food and beverage offer, providing a broader range of quality independent shops, facilities in terms of cafes, daytime dining, evening dining, and evening pubs and bars. A broadening of the quality and range of the offer is needed. As identified in the 2011 Study, the absence of a large foodstore centrally located in the town centre is a significant drawback, although it is acknowledged that there is limited scope for this to be provided anywhere except the vacant Gungate site.

5.40 The vacancy rate is very high, accounting for 18.5% of units in the centre, and there is a need to consider measures to repurpose the larger vacant units in the town centre. Overall, the vacancy rate in the centre presents significant cause for concern and needs to be closely monitored moving forwards.

5.41 However, it is acknowledged that the town centre is in transition, and it is important to caveat that our health check assessments have been undertaken at the time of a number of regeneration projects being underway in the town centre. These will help to diversify the uses in the town centre, introduce additional footfall, and better connect the town centre to its significant heritage assets and adjacent open space. All of these measures are supported and will leave the town centre in better standing once complete. They may in turn support new business openings and diversification. Whilst there are examples of less attractive interventions in the architectural offer of the town centre in recent decades, for the most part the centre remains attractive, and this key asset needs to be maximised as much as possible.

Key strengths	Key weaknesses
<ul style="list-style-type: none"> • Ongoing regeneration projects will diversify town centre and help generate additional footfall. • Good range of day to day shopping facilities. • Presence of Castle / Grounds and Tamworth Park are a significant asset. • Strong independent sector (both retail and leisure). • Market adds diversity and is a footfall generator. • Good levels of accessibility. • Good environmental quality and historic nature of town centre. 	<ul style="list-style-type: none"> • Vacancy rate is high (18.5%) and presents cause for concern. • Duplication in much of the retail offer – discount stores, charity shops. • Absence of larger supermarket. • Both retail and leisure offer is generally downmarket and would benefit from greater diversification. • Key leisure assets including the Odeon cinema, Snowdome indoor ski centre and Namco Funscape are detached from wider town centre offer.

Local & Neighbourhood Centres

5.42 In the remainder of this section, we provide an analysis of the network of local and neighbourhood centres across the Borough, these are set out in Policy EC4 of the adopted Local Plan. The role and function of these centres is to meet essential day to day needs of a localised catchment, the majority of whom would be expected to walk to the centre. The list of local and neighbourhood centres we have reviewed is set out below in **Table 5.5**. We have provided each centre with a reference ('LC' for Local Centre, 'NC' for Neighbourhood Centre), for ease of reference in the remainder of this section.

Table 5.5 Schedule of local and neighbourhood centres in Tamworth Borough

Reference	Name	Postcode
	LOCAL CENTRES	
LC1	Fotenaye Road, Coton Green	B79 8JUT
LC2	Masefield Drive, Leyfields	B79 8JA
LC3	Amington Road, Bolehall	B77 3LW
LC4	Caledonian Centre, Glascote	B77 2ED
LC5	High Street, Dotshill	B77 1LG
LC6	Ellerbeek, Stoneydelph	B77 4JA
LC7	Glascote Road	B77 3EF
LC8	Tamworth Road, Amington	B77 3DG
LC9	Exley, Field Farm Road	B77 2LA
	NEIGHBOURHOOD CENTRES	
NC1	Chartwell	B79 7UG
NC2	Cedar Drive	B79 8QL
NC3	Lakenheath	B79 8AP
NC4	Kerria	B77 4GG
NC5	Fazeley Road	B78 3JN
NC6	Tamworth Road, Two Gates	B77 1EG
NC7	Park Farm Road	B77 1DL
NC8	Pennymoor Road	B77 4LG
NC9	Scott Road	B77 3EY
NC10	Glascote Road	B77 2AF
NC11	<i>(This neighbourhood centre has been redeveloped as part of estate regeneration works)</i>	—
NC12a	Hockley Road	B77 5EG
NC12a (1)	Hockley Road	B77 5EQ
NC12b	Beachamp Road	B77 5HR
NC13	Wilnecote Road	B77 2LE
NC14	Watling Street, Wilnecote	B77 5BJ
NC15	Bowling Green Avenue	B77 5ED

5.43 We have undertaken sites visits to each of the local and neighbourhood centres to provide an updated schedule of retail and main town centre uses for each centre. The key objective of the analysis is to identify the ability which each of the centres has to respond to local residents' essential day to day shopping and services needs. In order to gain an understanding of this, for the local and neighbourhood centres we have identified the latest schedule of uses for each centre and distilled this data into a benchmarking exercise, to establish the extent of representation of the following 15 'key facilities' in each of the centres:

- **Convenience goods**
 - Supermarket
 - Small convenience stores
 - Newsagent/off licence
 - Other convenience outlets (e.g. bakery, greengrocer, international foods)

- **Comparison goods**
 - Post office
 - Pharmacy

- **Retail & leisure services**
 - ATM
 - Laundrette/dry cleaners
 - Public house
 - Café
 - Take-away
 - Hairdressers/beauty salon

- **GP surgery**
- **Dentist**
- **Library**

5.44 A scoring matrix has been applied on the basis of how many of the 15 aforementioned key facilities the centres achieve, as seen in **Table 5.6**. This assessment has only been applied to the local centres given the small size of the neighbourhood centres which in some cases comprise just two commercial units. It is acknowledged that a centre is rarely likely to score against all 15 criteria, and some of the services we have identified (e.g. GP surgeries, dentists and libraries) are not always located in defined centre locations but may be standalone facilities in residential areas. Nevertheless, the co-location of facilities such as these with other centre uses should evidently be considered desirable in order to support sustainable patterns of distribution of facilities in accessible locations, and reducing the need for residents to undertake multiple trips to access different facilities. We discuss the findings of our assessment in the following paragraphs.

Table 5.6 – Categorisation of Local Centres

Category	Facility Count
Category 1	10+
Category 2	8-10
Category 3	5-7

Category 1 Local Centres

5.45 Only one local centre within Tamworth Borough achieves 'category 1' status, which is **LC4 Caledonian Centre, Glascote**. This centre comprises a ground floor shopping precinct located within a wider 1960's/1970's

residential development. The local centre contains a total of 13 units, of which 11 are occupied by aforementioned key facilities. The centre contains two convenience stores that are occupied by national retailers, namely Spar and Best One. The centre also accommodates a newsagent, post office, pharmacy, ATM, public house, three takeaways and a library. Whilst the centre is well provided for in terms of key facilities, it does not benefit from located on a main road which would enable direct access to bus transportation. However, as the centre is relatively isolated from other local and neighbourhood centres, it plays an important role in meeting the day-to-day needs of local residents within walking distance. With just one vacant unit identified, the centre is showing strong levels of viability.

Category 2 Local Centres

- 5.46 Two local centres achieve category 2 status, namely **LC6 Ellerbeck, Stoneydelph** and **LC7 Glascote Road**. LC6 is located approximately 2.5km to the south-east of Tamworth town centre and comprises a total of nine units. The centre benefits from containing both a Morrisons Daily and a Spar convenience store, meaning it is able to meet the daily shopping needs of local residents. The centre also contains a pharmacy, GP surgery and a post office, amongst others. With just one vacant unit identified out of a total of nine units, it is considered that the centre is showing good levels of viability.
- 5.47 LC7 is the largest local centre contained within the Borough, comprising a total of 20 units and is highly accessible on account of eight bus routes serving the centre. Whilst the centre does not contain any nationally operated convenience stores, it does include a newsagent and an international food shop.

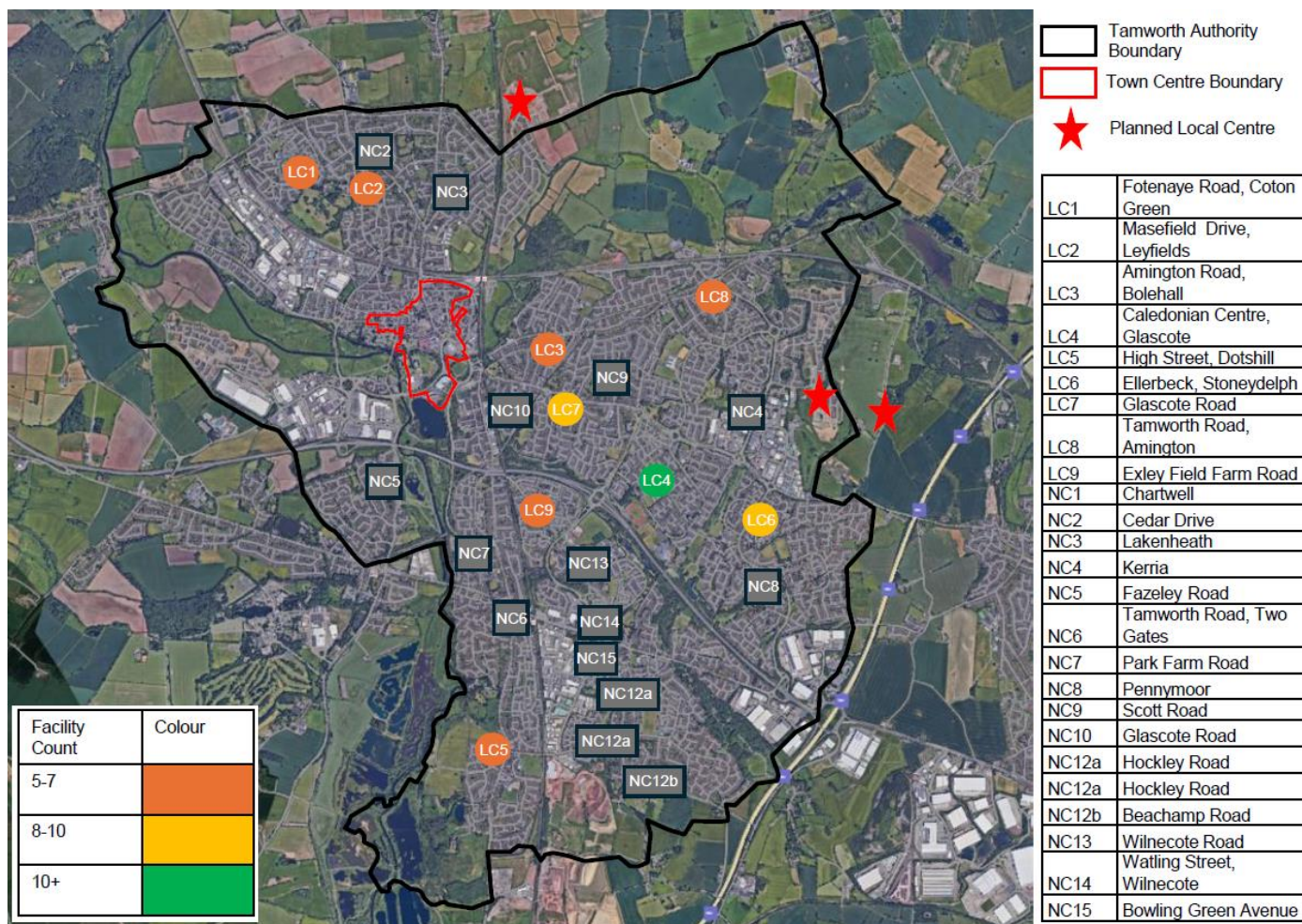
Category 3 Local Centres

- 5.48 A total of six local centres fall within category 3 (LC1, LC2, LC3, LC5, LC8 and LC9), meaning that they contain between 5-7 key facilities. Positively, each of these centres contain at least one nationally operated convenience store and nearly 50% contain two such stores. **LC3 Amington Road, Bolehall** contains both a Co-op and a Premier convenience store whilst **LC8 Tamworth Road, Amington** contains a Tesco Express and a Premier convenience store. Both LC5 and LC8 are isolated from other local and neighbourhood centres in addition to Tamworth town centre, meaning that they have a pertinent role in meeting day to day needs of local residents. Whilst these centres accommodate nationally operated convenience stores, neither contain an ATM, Café, GP surgery, dentist or a library. Across the category 3 local centres, the number of units range from 10 to 6, all of these centres have a low rate of vacancy; LC2 and LC9 each contain just one vacant unit.

'Heat map' of residents' access to services

- 5.49 **Figure 5.6** sets out a 'heat map', which shows the location of local centres based on the assigned categories set out above as well as the location of the neighbourhood centres which provide a more limited range of everyday facilities. It is considered that the north-west section of Borough is well provided for, containing two local centres and two neighbourhood centres. Both LC1 and LC2 which are located in this particular area, contain nationally operated convenience stores, post offices along with hairdressers. To the south, NC5 is isolated from other neighbourhood and local centres but is located in proximity to the Ventura Retail Warehousing which contains large format foodstores and retail warehouses, meaning that the surrounding residential area is well provided for in terms of both convenience and comparison goods shopping.
- 5.50 Figure 5.6 also shows the location of where further local / neighbourhood-level shopping facilities are likely to come forward in the future, identifying one location on the northern edge of the Tamworth urban area, and two locations on the eastern side of the town. The development of these new facilities is aligned to planned new residential-led urban extensions in these locations, which have either secured planning permission or can be expected to in the short term. Two of the three planned facilities fall outside the Borough boundary, but evidently will also be accessible by residents in the Borough. Further details of these residential extensions are set out in **Section 7** of this report.

Figure 5.6 Heat map of local centres



Source: Firstplan research. Map base: Google Maps

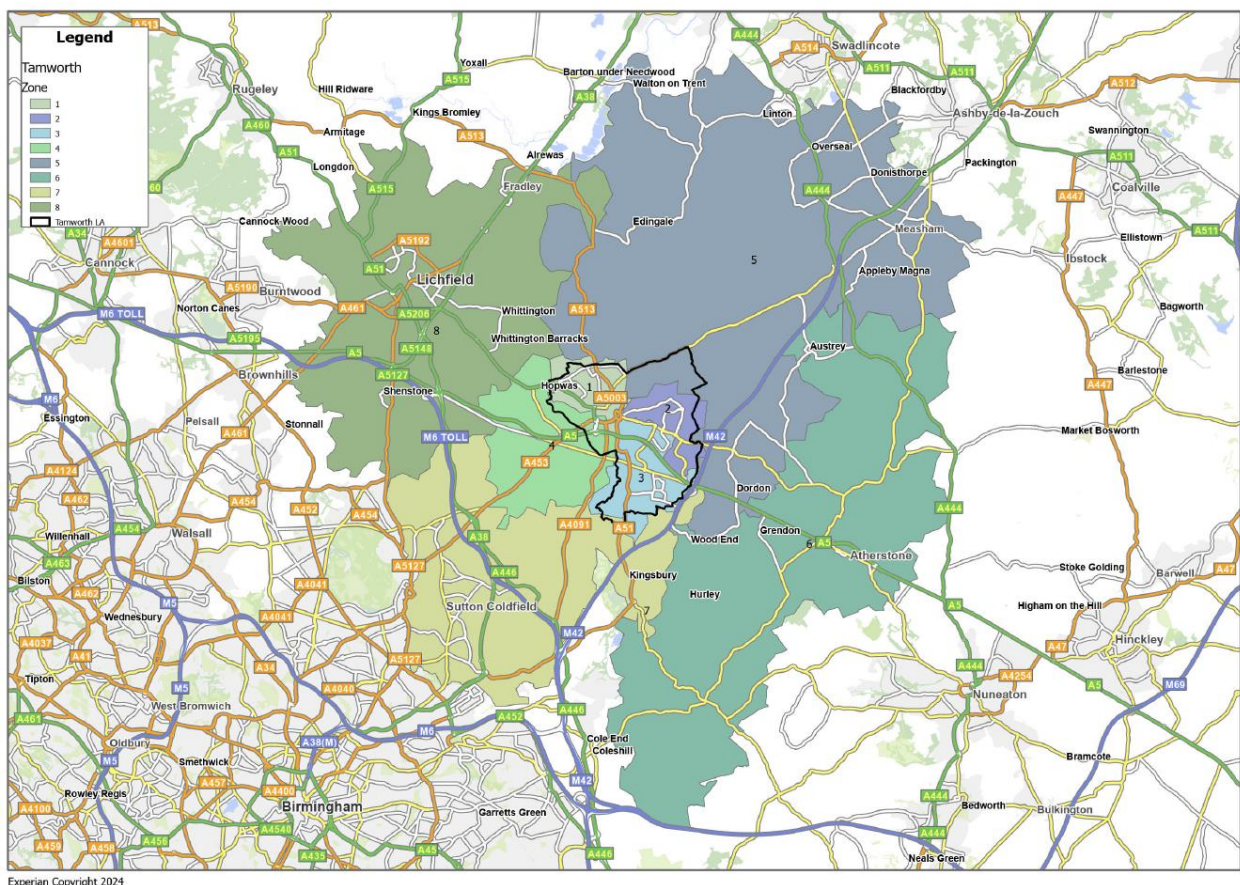
- 5.51 Although there is, as noted above, new provision expected to come forward on the eastern edge of the Tamworth urban area in the future, in the existing built up urban area of the north-eastern part of Tamworth there are extensive suburban areas which do not benefit from being in proximity to either local or neighbourhood centres, and the only centre which is located towards the north-eastern edge of the urban area is relatively limited in terms of the range of facilities it offers. Specifically, we consider the 'triangle' between LC8 (category 3) and neighbourhood centres NC4 and NC9 are an area where improvements in local-scale provision could potentially be beneficial, notwithstanding the improvements likely to come forward further to the east of this.
- 5.52 Closer to the town centre, LC3 has a relatively limited offer but in qualitative terms its location proximate to the better-provided for LC7 makes this shortfall in overall offer less of a concern. Furthermore, LC3 (category 2) contains off street parking and is highly accessible via bus services. In turn, residents who may not be within walking distance are still able to conveniently access the facilities within the centre.
- 5.53 The southeastern region of the Borough (Wilnecote area) lacks the provision of a local centre; however this area does contain several neighbourhood centres which are found in proximity to each other. Collectively, these centres enable sustainable patterns of shopping and access to local facilities with provision of multiple convenience stores and various supporting retail services. This area is also in proximity to the newly constructed Tame Retail and Trade Park which includes a Lidl supermarket and the Morrisons store at Wilnecote. Given the absence of a local centre in this part of Tamworth, there is a clear policy case for seeking additional provision of an appropriate scale in this part of the urban area.

5.54 The southwestern part of the Borough, south of Ventura, has limited provision beyond a neighbourhood centre. However, it is acknowledged that there is a concentration of commercial facilities at Fazeley, just outside the Borough, which residents in this part of Tamworth are likely to look towards, and therefore in qualitative terms we consider this area to be sufficiently provided for.

SECTION 6 | APPROACH TO HOUSEHOLD TELEPHONE SURVEY

- 6.1 This section sets out an introduction to the household telephone survey of shopping and commercial leisure patterns which has been undertaken in support of this study. The household telephone survey acts as a full update to an equivalent exercise which was undertaken in support of the 2011 Study; we have sought to retain the same overall survey area and sub-division into survey zones, which is considered to remain robust and an accurate reflection of the extent of the shopping and leisure catchment of Tamworth.
- 6.2 The extent of the household survey area is shown in **Figure 6.1**²⁵, with the administrative boundary of Tamworth Borough denoted by the heavy black line in the centre of the map. As can be seen, the Borough falls centrally within the survey area, and there is a surrounding 'buffer' area extending into neighbouring authority areas. Broadly speaking, this wider catchment area includes Lichfield to the north-west; parts of Sutton Coldfield (including the town centre) to the south-west; and Atherstone to the south-east. The area to the north-east of Tamworth is largely rural, extending as far as the fringes of Swadlincote and Ashby-de-la-Zouch, but not including either of these settlements. The extension of the survey area into these surrounding locations means the extent to which residents in these surrounding areas look towards destinations in Tamworth Borough for their shopping and leisure needs can be clearly captured.

Figure 6.1 Household survey area



- 6.3 As can be seen from **Figure 6.1**, the overall survey area has been divided into eight different survey zones, in order to enable local patterns of shopping to be accurately captured across different parts of the survey area. Tamworth Borough sits within zones 1-5 inclusive, although the urban area sits entirely within zones 1-4:

²⁵ A larger version of Figure 6.1 is reproduced as **Appendix 1**.

- Zone 1 covers the town centre and residential areas to the north of the town centre.
- Zone 2 covers the residential areas to the east of the town centre, broadly speaking those areas to the north of the B5000, and also areas east and west of Pennine Way.
- Zone 3 covers the residential areas to the south of the town centre, including the suburbs of Wilnecote and Hockley.
- Zone 4 covers the area to the west of the town centre, including the Ventura Retail Warehousing. Zone 4 also extends to cover parts of Lichfield District to the south, including the suburb of Fazeley, which whilst part of the Tamworth urban area, falls under the administration of Lichfield District.

6.4 Approximately one hundred telephone surveys were undertaken in each of the eight zones (800 in total). Respondents were contacted across a variety of days at the week and at different times, and respondents' key demographics (e.g. age bracket and gender) were recorded in order to ensure a robust sample of the local population was captured. All respondents surveyed were asked to confirm they were the principal shopper in the household.

6.5 The subdivision of the survey area into zones is as shown in **Table 6.1** (which also assigns each zone a name having regard to its broad geographical location). Patterns of shopping do not reflect local authority administrative boundaries and therefore, as noted above, the survey area also extends into neighbouring authority areas. The numbering and extent of the survey zone boundaries has been kept consistent with those in the 2011 Study; the exact boundaries of each of the zones are defined by a combination of postcode sectors, as also listed in **Table 6.1**.

Table 6.1 Household survey zone definitions by name & postcode sector

Zone	Zone name	Postcodes
1*	Tamworth West	B79 7 and B79 8
2*	Tamworth East	B77 3 and B77 4
3*	Tamworth South	B77 1, B77 2 and B77 5
4*	Fazeley	B78 3
5*	Rural North	B78 3, B78 1, B79 0, B79 9, DE12 6, DE12 7 and DE12 8
6	Atherstone	B46 2, CV9 1, CV9 2 and CV9 3
7	Sutton Coldfield	B72 1, B75 5, B75 6, B75 7, B76 0, B76 1, B76 2, B76 9 and B78 2
8	Lichfield	WS13 6, WS13 7, WS13 8, WS14 0 and WS14 9

Source: NEMS Market Research *denotes zone wholly or partly in Tamworth Borough

6.6 The household telephone survey results identify the shopping patterns of residents in the survey, for comparison (non-food) goods and convenience (food) goods, as well as patterns of commercial leisure visits. For comparison goods, questions were asked about shopping patterns for the following types of goods:

- Clothing & footwear;
- Furniture, carpets or soft household furnishings;
- DIY or decorating goods;

- Electrical items e.g. televisions, washing machines & computers;
- Health, beauty & chemist items;
- Recreational goods e.g. sports equipment, bicycles, musical instruments & toys;
- Other non-food items, e.g. books, CDs, vinyl, DVDs, Blu-Ray, jewellery, china & glass items.

6.7 A 'composite' set of shopping patterns was then produced, weighted by the average distribution of expenditure on each of these goods categories across the survey area, as identified by Experian. It is this 'composite' analysis which forms the basis of our comparison goods need analysis which is set out in the following section (**Section 7**) of this report.

6.8 For convenience goods, questions were asked on patterns of visits for 'main' food shopping (i.e. weekly/ bulk food shopping trips), 'top up' food shopping (basket/small but frequent purchases) and 'small shops' (visiting specialist local retailers). Again, a 'composite' version of these three sets of results was prepared and this information is used as the basis of our convenience goods need analysis which is set out in **Section 8** of this report.

6.9 In addition to surveys of patterns of shopping and leisure uses, respondents were asked a series of qualitative questions about their usage of Tamworth town centre, their likes and dislikes, and how it was considered the centre could be improved. The findings of these qualitative outputs have been discussed in previous sections of this report.

SECTION 7 | COMPARISON GOODS SHOPPING PATTERNS & IDENTIFICATION OF NEED

- 7.1 In this section we introduce the key inputs which form the basis of our assessment of the quantitative 'need' for new comparison goods retail floorspace in the Borough. We then go on to forecast the quantum of comparison goods floorspace which the Council should seek to plan for over the new Local Plan period. An equivalent assessment for convenience goods floorspace is undertaken in the following section.
- 7.2 The calculation of 'need' is a technical exercise which is derived from considering three key factors: where residents of the survey area are currently undertaking their shopping; how much population growth is expected to come forward in the survey area; and how much spending on convenience and comparison goods will increase, having regard to economic forecasts and other factors such as online shopping. We introduce these inputs in full below. The findings of this section should be considered alongside the retail capacity tabulations for comparison goods floorspace at **Appendix 1**.
- 7.3 The retail capacity forecasts set out in this section cover the period to 2040. Whilst this falls short of the period of the Council's new Local Plan Update period (to 2043), 2040 is the latest data to which expenditure projections are available from our data provider Experian. In any event, **it is advised that figures beyond the next ten years (i.e. beyond 2034) are only considered indicative** and should be subject to further review and updating during the course of the Plan period. This is because both economic circumstances and retail trends can change rapidly therefore longer-term forecasts of expenditure growth are more difficult to predict. For this reason, our advice is that quantitative need figures to 2034 should be taken forward into the Local Plan Update.

Calculation of quantitative need

- 7.4 The 'need' for new floorspace is calculated through a conventional and widely-accepted step-by-step methodology, consistent with best practice, which draws upon the findings of the household telephone survey of shopping patterns (as previously discussed) to model the current flows of expenditure (i.e. spending in £m) to each retail destination within the survey area, and those competing centres in the surrounding area. It should be noted that the 'need' figures presented at the end of this section and the following section (for convenience goods need) relate to those for Tamworth Borough only – i.e. they do not include the need for floorspace generated by other centres which fall within the household survey area; as we have previously set out the survey area also extends to include parts of neighbouring authority areas such as Lichfield, North Warwickshire and South Staffordshire.
- 7.5 The first stage in this exercise is establishing the 'baseline' position, which is developed as follows:
- **Step 1: Calculate the total population (Step 1a) and amount of convenience and comparison goods expenditure (Step 1b) which is available within the postcode sectors comprising the main centres' catchment areas (the 'survey area');**
 - **Step 2: Allocate the available expenditure to the convenience and comparison goods shopping destinations visited by residents within these postcode sectors, as defined by the household telephone survey of shopping patterns;**
 - **Step 3: Compare the total expenditure attracted to each shopping destination with the current retail floorspace to assess 'sales densities' (i.e. turnover per sq.m) in each shopping destination.**

Calculation of total population (Step 1a)

- 7.6 For the purposes of our 'baseline' needs assessment, we have utilised population projections provided by the data provider Experian. These are informed by ONS 2018-based Sub-National Population Projections (SNPPs) and are provided bespoke for each of the eight survey zones. Experian's population projections are produced using a 'demographic component model' which is based on a combination of Experian current age and gender estimates, and Government population projections by age/ gender bands at the Local Authority District level. The 'demographic component model' uses Experian 2022 mid-year age and gender estimates as a base, and projects these forward on a year-by-year basis over the desired period (as far as 2040).
- 7.7 The Experian model takes into account the following yearly components of population change in their projections, with the resulting rates of population change sense checked against Government/ONS population projections:
- Birth rate (applicable in the 0-4 age band);
 - Ageing (population received from preceding age band);
 - Ageing (population lost to succeeding age band);
 - Net migration (by age band);
 - Death rate (by age band)
- 7.8 Using GIS modelling, Experian are then able to apply these projections to a bespoke geographic area — in this case to mirror the boundaries of the household survey zones which combine to make up the survey area.
- 7.9 Experian's population projections are past trends-based population forecasts, and it is important to caveat that they are not 'policy forward', so may not fully reflect any planned levels of growth which may result in a level of population growth over and above that which has historically come forward. Through discussions with the Council, we have identified that there are four significant areas of planned residential growth on the periphery of Tamworth, which are likely to represent a level of population growth in excess of 'past trends'-based levels of growth, meaning a manual adjustment to the 'baseline' Experian population projections will be required.
- 7.10 A plan of these growth locations are shown at **Figure 7.1**. Sites 1 and 3 are located within Tamworth Borough; site 2 is located in Lichfield District and site 4 is located in North Warwickshire Borough²⁶. As can be seen from Figure 7.1, all are located on the periphery of the Tamworth urban area and it would be expected that residents in these areas would largely be looking towards facilities in Tamworth for their retail and leisure needs.
- 7.11 The residential developments identified are at various stages of development. Sites 1 and 3 have largely been built out in recent years (subsequent to the most recent ONS SNPP estimates); site 2 is currently under development; and site 4 is at final stages of planning. Each will deliver a significant number of new residential dwellings; site 1 will deliver over 500 new dwellings, and sites 2-4 will deliver over 1,000 new dwellings each²⁷.

²⁶ Site 4 does not, at the time of preparation of this study, benefit from formal planning consent. However, our understanding is that council Board members have resolved to grant permission for the development, subject to final Heads of Terms being agreed. It is understood that this matter is currently ongoing.

²⁷ Maximum number of dwellings as per planning applications.

Figure 7.1 Strategic residential growth locations in the Tamworth area



7.12 On the basis of the above, it is considered a robust approach to allow for a manual adjustment to Experian's baseline population figures. The parameters of this are shown in **Table 7.1**; this shows that:

- Sites 1 and 2 fall within survey zone 5.
- Sites 3 and 4 fall within survey zone 2.
- For all sites, we have converted the proposed number of dwellings into a population figure by applying an appropriate population density, and then added this resultant population figure to the baseline Experian population projection.
- Sites 1 and 3 have been added at the 2024 'base year', as these developments are already largely complete. Sites 2 and 4 have been added at the 2029 'interval year', as these developments are either under construction or expected to come forward within the next five years.

Table 7.1 Summary of residential growth locations added to baseline Experian population projections

Site	Site name	LPA	Survey zone	Proposed dwellings	Persons per household	Estimated population of site	Year applied to forecasts
Site 1	Anker Valley	Tamworth	5	555	2.38	1,273	2024
Site 2	Arkall Farm	Lichfield	5	1,000	2.3	2,300	2029
Site 3	Tamworth Golf Club, Amington	Tamworth	2	1,100	2.38	2,618	2024
Site 4	Robeys Lane, Alvecote	North Warwickshire	2	1,370	2.38*	3,261	2029

Source: Firstplan research. Estimated population has been calculated by applying number of proposed dwellings to household density figures based on 2021 Census data for Staffordshire districts²⁸. Note *we have not been able to locate an equivalent household density figure for North Warwickshire, and therefore figure for Tamworth Borough has been used here.

7.13 Experian’s population estimates and projections for the survey area (with our adjustments as discussed above) are shown in **Table CM1 (Appendix 1)/ Table CV1 (Appendix 2)** and are summarised in **Table 7.2**. This shows that between 2022 (the base year for which Experian population data is available) and 2040, the population of the survey area is expected to increase by 19,510 persons.

Table 7.2 Experian population forecasts for survey area to 2040

Base/ interval year	2024	2029	2034	2040	Change 2024-40
Population	267,707	277,880	282,076	282,217	+19,510

Source: Experian Micromarketer, 2024. Note: (*) denotes actual population; all other forecasts are projections / estimates.

Available expenditure in the survey area (Step 1b)

7.14 Experian identify a ‘per capita’ spend (spend per head) on comparison goods for each of the eight survey zones. These per capita figures are shown in **Table CM2 of Appendix 1**. This shows that per capita spend on comparison goods ranges from £3,786 per person in zone 2 (Tamworth East) to £4,679 per person in zone 8 (Lichfield). The average per capita spend across the survey area is £4,188 per person, and the average for Tamworth Borough (zones 1-4) is £3,981 per person. To help put this into context, the UK average comparison goods spend is £3,809 per persons both the survey area as a whole and also those parts of the survey area which fall within Tamworth Borough sit marginally above the current UK average. It should be noted that all

²⁸ <https://www.staffordshire.gov.uk/Observatory/Data/Documents/Census-2021-Household-Briefing-Note-FINAL.pdf>

figures relate to those for the expenditure base year of this study, which is 2022, reflecting the most up to date data available from Experian at the time of preparation of this study.

- 7.15 Per capita spend does not typically remain static and is influenced by some of the wider economic factors which this study has previously identified. Experian produce guidance in their ‘Retail Planner Briefing Note’ releases on the extent to which per capita spend on goods categories may change over time; this guidance is typically published by Experian on an annual basis.
- 7.16 The most recent guidance in this respect is set out in **Experian Retail Planner Briefing Note 21 (‘RP21’), published in February 2024**, as introduced previously in this study. RP21 forecasts a decrease in per capita (per head) spend on comparison goods for the period 2024-25 of -1.2%, as the wider constraints on growth and cost of living crisis continues to impact on household spending, but for the remainder of the Plan period relatively high levels of annual growth in spending on comparison goods are forecast, peaking at +3.1% per annum between 2026 and 2030 before cooling slightly to 2.8% per annum for the period to 2040. As identified above, as Experian do not forecast expenditure growth rates (or ‘SFT’ rates, discussed below) beyond 2040, we use this date as the cut-off for our assessment of quantitative need.
- 7.17 The expenditure growth rates identified in RP21 represent high levels of annual growth in comparison goods spend and are, for example, more optimistic than the +2.5% per annum annual growth for the period 2025-29 forecast by Experian in the preceding Retail Planner Briefing Note 20 (which was published by Experian in February 2023).
- 7.18 It is necessary to make an adjustment to the Experian per capita spend figures to allow for nonstore methods of shopping, known as ‘Special Forms of Trading’ (SFT) to be removed from the retail capacity forecasts. This is because the forecasts only seek to provide of the amount of physical ‘bricks and mortar’ floorspace which the Council needs to plan for, and therefore spending directed towards to other forms of shopping — principally online shopping — needs to be removed.
- 7.19 This exercise is undertaken in **Table CM3 of Appendix 1**. The proportion of total spend which has been deducted is derived from the household survey results and is then adjusted for future years in line with rates of UK average SFT growth based on forecasts set out in RP21. The deductions applied are summarised for ease of reference in **Table 7.3**.

Table 7.3 Comparison goods SFT adjustments

	2024 (study base year)	2029 (interval year)	2034 (interval year)	2040 (interval year)
UK average – Experian Retail Planner 21 Feb 2024)	24.3%	27.4%	28.8%	29.8%
Change from previous interval period	-	+3.1%	+1.4%	+1.0%
Survey area average with growth from ERP applied	33.8%	36.9%	38.3%	39.3%

Source: household survey results & Experian Retail Planner Briefing Note 21 (RP21). For figures for 2040, as Experian only set out projections to 2039, we have applied a 0.1 percentage point per annum change for the period 2039-40.

- 7.20 The household survey results indicate that online comparison goods shopping rates in the survey area are, broadly, in the region of 10 percentage points higher than the current UK average. Responses from the household survey indicate that at 2024, residents in the survey area are directing an average of 33.8% of their comparison goods shopping to SFT/online; this compares to a current UK average (identified by Experian in Retail Planner Briefing Note 21) of 24.3%. By applying Experian's UK average SFT growth rates to this 'local' figure of 33.8%, it means that by the end of the study period (2040), SFT could account for up to 39.3% of total comparison goods spend, i.e. just under £4 in every £10 spent on comparison goods. This online spend is removed from our quantitative need assessment, as this study solely considers the need for additional 'physical' retail floorspace in the Borough. We have, therefore, applied these 'adjusted' SFT forecasts in the bottom row of **Table 7.3** to our quantitative needs assessment.
- 7.21 By applying the population forecasts to the per capita expenditure (with the adjustments for SFT applied), we can establish the total amount of 'physical retail' spending which is currently available to residents of the survey area, and how much this is expected to increase over the course of the study period to 2040. This exercise is also set out in **Table CM3 of Appendix 1** and shows that:
- total comparison goods spending in the survey area, once SFT is removed, is currently (2024) £705.8m;
 - this is expected to increase to £887.1m by 2034 (growth of £181.3m from 2024);
 - this is expected to increase to, indicatively, £1,049.1m by 2040 (growth of £343.3m from 2024).

Shopping patterns in the survey area (Step 2)

- 7.22 The household telephone survey results allow us to see the proportion of total available spend which is retained within the survey area (known as its 'retention rate'), and the proportion which is spent in locations further afield (often referred to as 'leakage'). This indicator is a good reflection of both the strength of the retail offer of town centres and other retail destinations in a survey area, and also can be expected to take into account other factors such as accessibility and quality of experience for users of the centres.
- 7.23 The total comparison goods market share which each comparison goods shopping destination draws from the survey area is shown in the final column of **Table CM5a of Appendix 1**. This shows that 67.9% of all available comparison goods spending is retained within the survey area, including 47.5% which is retained by centres and stores within Tamworth Borough. A further 30.3% is spent at destinations outside the survey area; the principal locations outside the survey area which draw comparison goods spend are Birmingham, Swadlincote, Sutton Coldfield²⁹ and Burton-upon-Trent. The remaining 1.8%³⁰ is spent in local shops/centres across the survey area, which are excluded from the main comparison goods needs analysis.
- 7.24 A critical point to take from the household survey results for comparison goods shopping is that, as a location overall, Tamworth benefits from generally high levels of expenditure retention from the survey zones which cover the Tamworth urban area, i.e. zones 1-4, with between 74.3% and 88.0% of available comparison goods expenditure retained by centres/stores in the Borough. This means that relatively little comparison goods spending is flowing outside of the urban area by local residents, which in itself represents a positive message in terms of Tamworth's wider sustainability as a shopping destination. However, as the analysis proceeds to set out below, a significant majority of this spending is captured by the town's retail parks, rather than the town centre.
- 7.25 **Table 7.4** summarises the comparison goods 'retention rate' of Tamworth Borough by zone, confirming the high levels of retention displayed by zones 1-4. Table 7.4 also shows that, beyond zones 1-4, the retention rate decreases as residents are often more closely located to other shopping destinations. Nevertheless, Tamworth

²⁹ Sutton Coldfield falls partly within, and partly outside, the survey area, and therefore this relates to those parts of Sutton Coldfield outside the survey area, covering areas such as Mere Green.

³⁰ Note that figures may not fully tally due to rounding

still captures over 25% of comparison goods market share from these zones, although again, virtually all of this is attributable to the retail parks.

Table 7.4 Comparison goods Retention rate – stores and destinations in Tamworth Borough by zone

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2024	88.0%	79.2%	74.3%	82.2%	46.2%	47.3%	25.8%	28.2%

Source: Table CM4, Appendix 1.

7.26 **Table 7.5** summarises the most popular locations for comparison goods shopping for residents in the survey area, covering locations both within and outside the survey area boundaries in order to build up an overall picture of comparison goods shopping patterns. Centres / destinations within Tamworth Borough are shown in bold text.

Table 7.5 Main locations for comparison goods shopping in survey area (destinations in Tamworth Borough shown highlighted)

Rank	Centre / Retail destination	Comparison goods spend from survey area, 2024 (£m)	% of total available comparison goods spend
1	Tamworth — Ventura Retail Warehousing[^]	278.6	39.5%
2	Birmingham conurbation — all locations (includes city centre, retail parks, Walsall, Solihull)	77.5	11.0%
3	Lichfield — city centre	50.7	7.2%
4	Sutton Coldfield — town centre	45.5	6.4%
5	Tamworth — town centre	45.0	6.4%
6	Sutton Coldfield — other ^{**}	39.7	5.6%
7	Burton-upon-Trent — all locations	26.0	3.7%
8	Swadlincote — all locations	25.1	3.6%
9	Lichfield — other locations	13.9	2.0%
10	Atherstone	9.9	1.4%

Source: Table CM5a, Appendix 1. Note* - 'all locations' refers to all retail destinations within the listed urban area – i.e. town/city centres, retail parks, non-food floorspace in foodstores etc. **combined figure for destinations within and destinations outside the survey area boundary. [^]See discussion below for clarification of which destinations this figure includes.

7.27 **Table 7.4** shows that, by some margin, the greatest proportion of comparison goods spend available to residents in the survey area is accounted for by the collection of retail parks and out-of-centre retail warehousing around Ventura Park Road, all of which are located within zone 4 of the survey area. Combined, these facilities attract over £275m of comparison goods spend from the survey area, accounting for 39.5% of total available comparison goods spending within the survey area. This analysis thus confirms the Borough's retail warehousing to be a substantial and dominant factor in comparison goods shopping patterns for residents of the survey area. Analysis of the household survey information confirms that the retail warehousing attracts market share from across the survey area and commands a noteworthy market share from each of the eight survey zones. Further discussion of this is provided below.

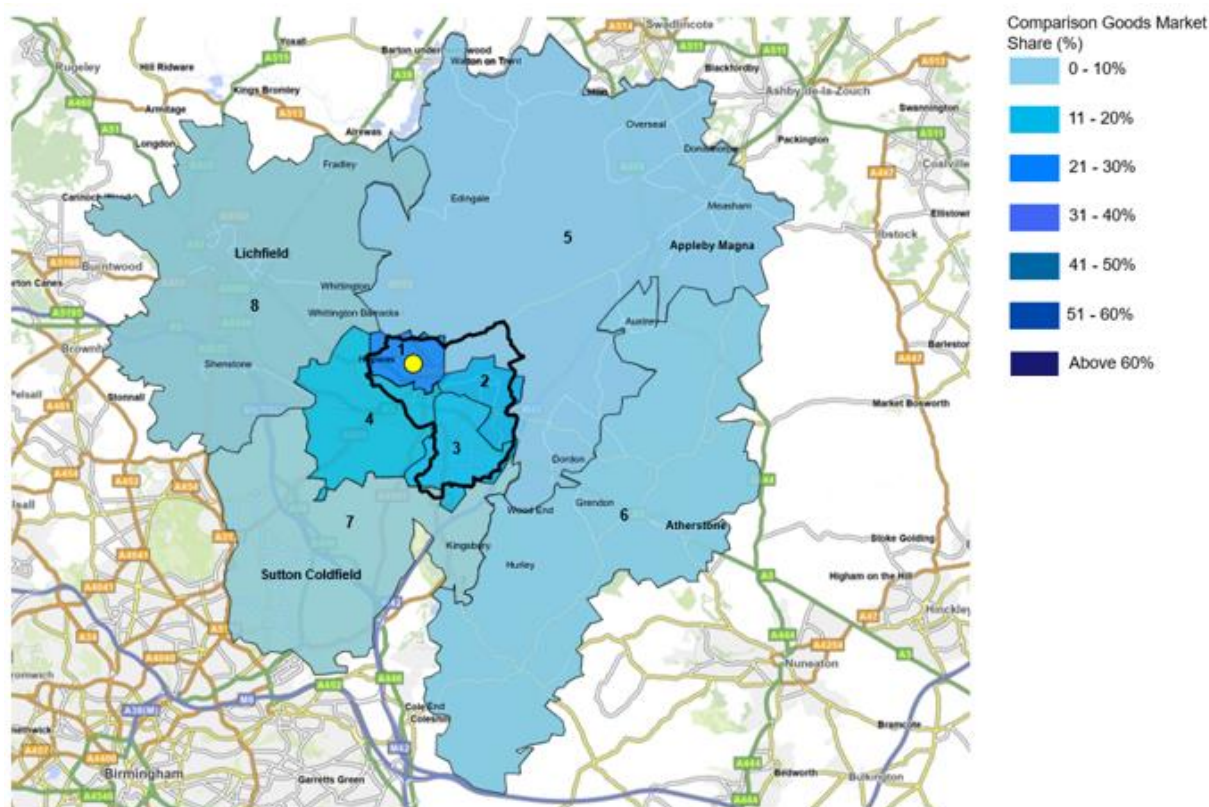
7.28 Following this, £77.5m of comparison goods spend is directed towards Birmingham. This figure is a combined figure for the Birmingham conurbation and whilst approximately one-third of this figure is accounted for by Birmingham city centre (£26.2m), retail warehousing and shopping parks in the Erdington area, on the eastern side of Birmingham, account for £29.0m of spend; in this area there are a number of significant out-of-centre retail facilities such as Fort Shopping Park which includes large branches of Primark, Next and Boots for example.

7.29 Following this, Lichfield city centre and Sutton Coldfield town centre attract similar amounts of spend from the survey area, at £50.7m and £45.5m respectively (it should be noted that both centres would be expected to attract additional comparison goods spend from outside the survey area given their location on the periphery of the survey area and therefore their turnover is in reality likely to be higher than this); and Tamworth town centre follows this with a comparison goods turnover of £45.0m. The comparison goods turnover of Tamworth town centre is therefore approximately 20% of that of the retail warehousing, confirming that in relative terms the town centre performs a significantly more limited role and function as a comparison goods shopping destination.

Comparison goods retail catchment for Tamworth town centre

7.30 **Figure 7.1** shows the extent of the comparison goods shopping catchment for Tamworth town centre, with the darker shading identifying the survey zones from where the town centre has its strongest catchment and the lighter shading the areas from where the town centre attracts more limited market share. The data in the image is informed by the market shares for the town centre identified in the household survey, summarised in **Table CM4 of Appendix 1**.

Figure 7.1 Tamworth town centre comparison goods retail catchment



Source: household telephone survey results

7.31 Analysis of Table CM4 of Appendix 1, shown visually on Figure 7.1, shows that Tamworth town centre:

- Draws its highest market share for comparison goods shopping from zone 1 (Tamworth West) at 21.1%

- Draws slightly lower market shares from zone 2 (Tamworth South) and zone 3 (Tamworth East) at 17.5% and 15.0% respectively
- Draws a market share of 11.5% from zone 4 (Fazeley); despite this zone being well placed in terms of access to the town centre it also contains the large retail parks around Ventura Park Road.
- Draws a market share of under 10% from the remaining four survey zones (for three of these zones, the market share is under 5% including from zone 7 where the town centre attracts no market share).

7.32 Whilst there is no hard and fast rule, we generally consider centres / retail destinations which attract a market share upwards of 30% for comparison goods shopping to have a ‘dominant’ influence over comparison goods shopping from residents in that zone, and where destinations attract a market share of between 10% and 30% the centre / destination in question has a ‘secondary’ influence on comparison goods shopping.

7.33 Working on this basis, it can be seen that Tamworth town centre does not have a ‘dominant’ influence on comparison goods shopping for any of the survey zones but has a strong ‘secondary’ influence across zones 1 to 4 respectively (**Table 7.6**). These areas therefore can be considered to represent the extent of town centre’s overall comparison goods shopping catchment. As these zones broadly equate to the administrative boundaries (and built-up area) of the Borough, a further conclusion which can be drawn is that Tamworth town centre’s catchment as a comparison goods shopping destination does not extend, in significant terms, beyond the Borough itself.

Table 7.6 Tamworth town centre comparison goods market share by zone

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2024	21.1%	17.5%	15.0%	11.5%	6.5%	2.0%	0.0%	1.1%

Source: Table CM4, Appendix 1. Blue shading denotes secondary market share from these zones.

Comparison goods retail catchment for Tamworth retail warehousing

7.34 As we have set out above, the collection of retail parks and standalone retail warehousing in zone 4, on the western side of Tamworth, located off Ventura Park Road (referred to as the Ventura Retail Warehousing), is by some margin the most popular destination for comparison goods shopping for residents in the survey area, accounting for almost 40% of available comparison goods spend. **Table CM5a of Appendix 1** provides a breakdown of where this spending is directed within the retail parks, and identifies that, of the £278.6m comparison goods spend directed towards the retail parks in zone 4:

- The majority of spend is directed towards Ventura Retail Park (£204.7m), which includes branches of Primark, Next, Currys, Matalan, JD, Boots, H&M, Sports Direct, Smyths Toys, Hobbycraft and Blacks.
- The M&S store next to Ventura Retail Park draws a further £23.0m of comparison goods spend.
- Cardinal Point Retail Park (bulky goods retail park including B&Q, Tapi Carpets and Oak Furnitureland) draws £17.6m of comparison goods spend.
- Jolly Sailor Retail Park (TK Maxx, Poundland, Pets at Home) draws £12.0m of comparison goods spend;
- Asda at Ventura Road draws £11.9m of comparison goods spend; in addition to Asda’s own extensive non-food range, the Tamworth branch also includes a Decathlon concession.
- Smaller amounts of comparison goods spend are attributable to other stores such as Sainsbury’s, Aldi and Home Bargains.

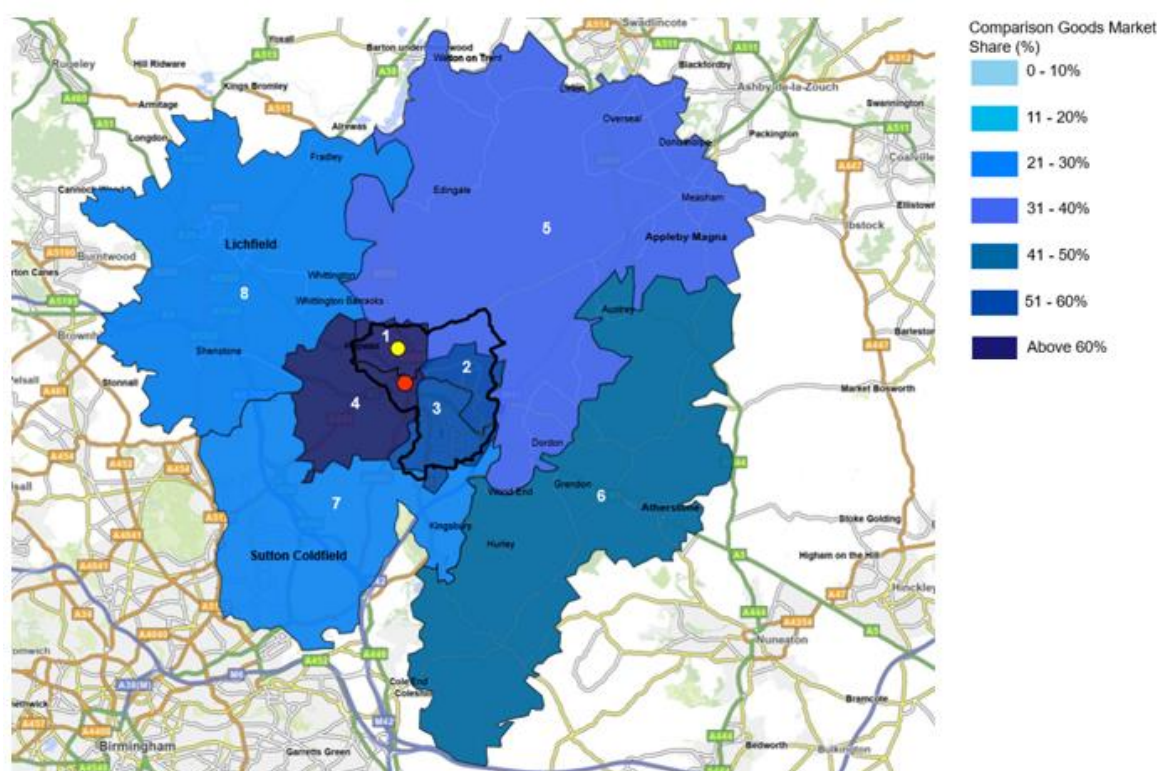
7.35 It is clear that the Ventura Retail Warehousing competes for spend with the town centre, and indeed many operators who typically trade from town centres such as H&M, TK Maxx, New Look, JD, Blacks and Poundland

are represented out-of-centre instead, although Poundland has stores in both locations. It is noteworthy that Boots — a town centre anchor store in town centres of all sizes — have recently consolidated their sole representation in Tamworth to be at Ventura Retail Park.

7.36 Analysis of the market shares drawn to the zone 4 retail warehousing shows that they attract market share from across the survey area. For six of the eight survey zones, the zone 4 retail warehousing has a ‘dominant’ influence over comparison goods shopping patterns and for the remaining two zones (zones 7 and 8) it has a ‘secondary’ influence. However, such analysis does not fully articulate the extent of influence over shopping patterns; the Ventura Retail Warehousing attracts a combined market share of 65.8% from zone 1 (Tamworth West), 58.8% from zone 2 (Tamworth East), 53.4% from zone 3 (Tamworth South) and 65.7% from zone 4 (Fazeley). These are significantly high market shares and confirm the extent to which this collection of retail warehousing and foodstores effectively dominates comparison goods shopping patterns of residents in the survey area.

7.37 A full zonal breakdown of the market shares attracted to the retail warehousing in zone 4 is set out in **Table 7.7** and shown visually as **Figure 7.2**.

Figure 7.2 Ventura Retail Warehousing comparison goods retail catchment



Source: household telephone survey results

Table 7.7 Tamworth zone 4 retail warehousing comparison goods market share by zone

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2024	65.8%	58.8%	53.4%	65.7%	37.8%	43.2%	25.4%	27.0%

Source: Table CM4, Appendix 1. Purple shading denotes dominant market share from these zones. Blue shading denotes secondary market share from these zones. The figures shown above represent combined market share from Ventura Retail Park; Cardinal Point Retail Park; Jolly Sailor Retail Park; M&S; Asda; Sainsbury’s; Aldi; Home Bargains, all located within the retail warehousing area focussed on and around Ventura Park Drive in zone 4 of the survey area.

Competition for comparison goods shopping for residents in the Borough

7.38 **Table 7.8** shows the most popular comparison goods shopping destinations at the zonal level, showing where residents in different parts of the survey area are travelling for their comparison goods shopping. A purple highlight of a particular centre/destination indicates what we consider to be a ‘dominant’ market share (a market share of 30%) or more from any individual zone, and a blue highlight identified what we consider to be a ‘secondary’ market share (a market share of between 10 and 30%). This analysis is useful for two reasons:

- Firstly, it enables the core comparison goods shopping patterns of residents who live in the zones which comprise Tamworth Borough — which we have broadly taken to be zones 1 to 4 (although the administrative boundary also extends to fall within zone 5 there is no major population in the Tamworth Borough part of this zone) — to be understood, and identification of key competing destinations to be made.
- Secondly, it enables analysis of the extent to which the comparison goods retail catchments of centres in Tamworth Borough extend beyond the Borough itself and into neighbouring authority areas.

Table 7.8 Main locations for comparison goods shopping by survey zone

Zone number	Zone name	Most popular comparison goods shopping destination (2024) (%)	2nd-Most popular comparison goods shopping destination (2024) (%)	3rd-Most popular comparison goods shopping destination (2024) (%)
1	Tamworth West	Ventura RW** (49.2%)	Tamworth town centre (21.1%)	Birmingham (all) (2.3%)
2	Tamworth East	Ventura RW (42.5%)	Tamworth town centre (17.5%)	Birmingham (all) (5.1%)
3	Tamworth South	Ventura RW (39.6%)	Tamworth town centre (15.0%)	Birmingham (all) (10.7%)
4	Fazeley	Ventura RW (50.3%)	Tamworth town centre (11.5%)	Lichfield (all) (4.9%)
5	Rural North	Ventura RW (27.7%)	Swadlincote (all) (20.1%)	Burton (all) (11.1%)
6	Atherstone	Ventura RW (32.5%)	Atherstone (12.6%)	Birmingham (all) (6.8%)
7	Sutton Coldfield	Sutton Coldfield* (33.3%)	Birmingham (all) (22.2%)	Ventura RW (19.6%)
8	Lichfield	Lichfield (all) (37.8%)	Ventura RW (17.8%)	Birmingham (all) (13.7%)

*Purple shading denotes dominant market share from these zones. RW= Retail Warehousing. Source: Table CM4, Appendix 1. **The figures shown above represent combined market share from Ventura Retail Park; Cardinal Point Retail Park; Jolly Sailor Retail Park; M&S; Asda; Sainsbury’s; Aldi; Home Bargains, all located within the retail warehousing area focussed on and around Ventura Park Drive in zone 4 of the survey area*

7.39 **Table 7.8** therefore confirms the dominant position which the retail warehousing at Ventura has over shopping patterns in the survey area, acting as the ‘dominant’ comparison goods shopping destination from five of the eight survey zones, as well as a slightly more limited — but nevertheless — high market share from zone 5 where it competes with Swadlincote and Burton-upon-Trent. Residents in zones 7 and 8 look towards their local retail facilities (in Sutton Coldfield and Lichfield respectively) to a greater degree than Ventura, but even from these zones the market share which Ventura attracts is 19.6% and 17.8% respectively.

7.40 The influence of Tamworth town centre over comparison goods shopping patterns is less pronounced but the town centre does attract a market share of between 11.5% and 21.1% from each of its 'local zones' (zones 1-4), confirming it attracts sufficient market share to be considered a 'secondary' influence on comparison goods shopping patterns from these zones. Tamworth town centre does not attract significant market share from the remaining survey zones, as we have set out above.

Changes in comparison goods shopping patterns

7.41 We have undertaken analysis which seeks to compare the current patterns of shopping with those identified by the 2011 Study, to understand the extent to which shopping patterns for residents in the survey area have changed in the intervening twelve years. As previously explained, the survey area (and split into survey zones) for the household survey undertaken in support of this study was kept unchanged in order to assist with this analysis. We would, nevertheless, highlight that the analysis set out below should be taken as indicative due to potential differences in survey questions between the two studies and methodological differences in undertaking the related quantitative need analysis.

7.42 **Table 7.9a and b** sets out a comparative analysis of the market share of the town centre at 2011 and 2024 (**Table 7.9a**). It then repeats the exercise for the Ventura Retail Warehousing (**Table 7.9b**). It shows that:

- Tamworth town centre appears to have lost comparison goods 'market share' across each of the eight survey zones since the 2011 Study. In some cases the drop has been significant, most particularly from zone 1 (Tamworth West) and zone 4 (Fazeley).
- Tamworth town centre commanded a slightly lower market share from zones 2 and 3 compared to zones 1 and 4 at the time of the 2011 Study, but even from these zones there has been further decrease in market share in the intervening period.
- Tamworth town centre's ability to attract market share from beyond the Tamworth urban area (i.e. zones 1-4) has also decreased, with a double-digit percentage point decrease from each of zones 5 to 8. There are particularly significant declines in market share from zone 5 (Rural North) and zone 6 (Atherstone), whilst in zone 7 Tamworth town centre was not recorded as attracting any market share, having previously accounted for over 10%.
- Ventura Retail Warehousing appears to have seen increases in its market share over the same time period from six of the eight survey zones, most significantly from zones 1 and 4 where the increase is approximately 17.7 and 10.5 percentage points respectively, as well as zone 6, which has seen a 11.7 percentage point increase to Ventura Retail Warehousing. The market share attracted to Ventura Retail Warehousing appears to have decreased from zones 2 and 3, but only fractionally. Overall, however, it is apparent that Ventura Retail Warehousing now commands a higher 'market share' from the majority of the survey area than was the case in 2011, and from some parts of the survey area this increase appears to have been quite significant.

7.43 It is important to note however that in the zones where Tamworth town centre has lost market share to Ventura Retail Warehousing, the relationship is not binary. From zones 1, 4, 5 and 6 roughly three-quarters of the decline in Tamworth town centre's market share has been offset by an increased market share for Ventura, but other destinations are also competing for market share; for example in Tamworth the new retail warehousing around Tame Valley accounts for some additional market share (albeit fairly limited except in the case of zone 3), whilst destinations outside the catchment have also, as our study has set out, seen improvements come forward to their comparison goods offer.

7.44 It is also important to note that competition between the town centre and Ventura Retail Warehousing is not new; the retail warehousing was commanding comparison goods market shares in excess of 60% from zones 2 and 3 in 2011, as well as 55.1% from zone 4 and 48.1% from zone 1. However, it appears to be the case that

the influence and dominance of the Ventura Retail Warehousing over comparison goods shopping patterns has significantly further strengthened in the years following the 2011 Study.

Table 7.9a Analysis of change in comparison goods market share of Tamworth town centre, 2011 Study & 2024 Study

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2011	41.5%	23.6%	23.0%	25.2%	20.0%	17.8%	11.1%	12.0%
2024	21.1%	17.5%	15.0%	11.5%	6.5%	2.0%	0.0%	1.1%
Change	-20.4%	-6.1%	-8.0%	-13.7%	-13.6%	-15.8%	-11.1%	-10.9%

Table 7.9b Analysis of change in comparison goods market share of Ventura Retail Warehousing, 2011 Study & 2024 Study

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2011	48.1%	60.0%	61.7%	55.1%	28.5%	31.4%	18.1%	23.5%
2024	65.8%	58.8%	53.4%	65.7%	37.8%	43.2%	25.4%	27.0%
Change	+17.7%	-1.2%	-8.3%	+10.5%	+9.3%	+11.7%	+7.3%	+3.5%

Notes for Tables 7.9a and 7.9b: Source: 2011 Study & Table CM4 Appendix 1. Please note, figures may not add due to rounding. *The figures shown above represent combined market share from Ventura Retail Park; Cardinal Point Retail Park; Jolly Sailor Retail Park; M&S; Asda; Sainsbury's; Aldi; Home Bargains, all located within the retail warehousing area focussed on and around Ventura Park Drive in zone 4 of the survey area. Please note the caveats regarding the potential differences in methodological approaches between the two studies as discussed at paragraph 7.41.

Assessment of trading performance (Step 3)

7.45 Table CM8 of Appendix 1 shows that, on average, comparison goods floorspace in Tamworth Borough is currently trading at £5,859 per sq.m (at 2024). This figure represents the combined trading performance of comparison goods floorspace in Tamworth town centre and retail parks / retail warehousing, plus comparison goods floorspace within large foodstores. It excludes any comparison goods floorspace in local / neighbourhood centres. We consider that the sales density performance is broadly in line with our expectations; it is a relatively high sales density which reflects the extensive retail warehousing floorspace in the Borough. Typically, this floorspace is more modern than town centre floorspace and therefore trades more 'efficiently', i.e. is able to command a higher turnover per sq.m than the older / more dated floorspace stock in the town centre.

Other inputs into the quantitative need assessment

Sales efficiency

7.46 It is also necessary to factor in changes in respect of 'sales efficiencies'; this is the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs, such as rents, rates and service charges, by increasing their average sales densities. Sales efficiency rates are provided by Experian in RP21 and for comparison goods floorspace the following rates have been applied:

Period	2024-25	2025-26	2026-40 [^]
Sales efficiency rate used	-2.6%	1.5%	2.6% per annum

Source: Experian Retail Planner Briefing Note 21 [^]Experian do not project sales efficiency growth beyond 2040. Longer term forecasts should be considered indicative.

Floorspace data

7.47 The comparison goods floorspace data which we incorporate into our modelling has been drawn from a range of data sources, including Experian Goad, commercial property websites and the Council's own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

'Commitments' for new comparison goods retail floorspace

7.48 In calculating retail floorspace capacity, it is necessary to deduct 'commitments' for new comparison goods floorspace — this is comparison goods floorspace which has been permitted but was not trading at the time of the household telephone survey undertaken in support of this study. These commitments will thus act as a 'claim' on the future amount of comparison goods floorspace which needs to be planned for. However, we have reviewed the commitments data provided by the Council and have not identified any commitments which require including in our quantitative comparison goods need assessment.

Identification of comparison goods capacity

7.49 Having undertaken the assessment of shopping patterns and trading performance, we set out the quantum of comparison goods floorspace which the Council should seek to plan for over the period to 2040, summarised in **Table 7.10**.

7.50 We have assumed that any new comparison goods floorspace would trade broadly in line with that of existing, with some allowances for improvements on account of modern floorspace generally being more 'efficient' in terms of turnover per sq.m. On this basis we have assumed that new comparison goods floorspace would trade at a base of £5,000 per sq.m at 2024, with these sales densities themselves improving in efficiency over the course of the Plan period. We consider these to represent appropriate sales densities to use having regard to the current trading performance of comparison goods floorspace in the Borough.

7.51 It is reiterated that capacity forecasts become increasing open to margins of error over time and should be refreshed over the Plan period, and on this basis forecasts beyond 2034 should be considered indicative. The forecasts are based on a 'constant market share' approach, assuming that current patterns of comparison goods shopping (as identified by the household telephone survey) will remain unchanged over the course of the Plan period to 2043. As our analysis has previously set out, we are, at the time of preparation of this study, not aware of any major development proposals within or surrounding the survey area which would indicate that these shopping patterns will materially change in the short to medium term, although clearly that may change in the future.

7.52 Table 7.10 shows that there is a relatively modest need for new comparison goods floorspace arising in the Borough, of 2,500 sq.m net by 2029, increasing slightly to 2,700 sq.m net by 2034 and then, indicatively, to 3,500 sq.m net by 2040. It should be noted that the figures in Table 7.10 are cumulative, meaning that, for example, between 2029 and 2034, the 'need' only increases by 200 sq.m net. As we have emphasised,

forecasts beyond the next ten years (i.e. beyond 2034) are highly subject to change and therefore it is strongly recommended that need figures to 2034 are taken forward into the Council’s new Local Plan, with figures beyond this subject to further review during the Plan period.

Table 7.10 Estimated comparison goods floorspace need for Tamworth Borough, 2024-40

Interval year	2029	2034	2040*
Estimated comparison goods floorspace requirement (sq.m net, rounded)	2,500	2,700	3,500

*Source: Table CM8a, Appendix 1 *indicative forecast, should be subject to further review during Plan period*

- 7.53 The comparison goods need figures we have identified are relatively modest, but reflective of the fact that existing floorspace in the Borough trades well, and the need for new floorspace is invariably tempered by approximately one-third of all comparison goods spending in the Borough (rising to approximately 40% by the end of the Plan period) being directed online. The fact that there is a positive need identified is largely generated by (1) the strong trading performance of the Ventura Retail Warehousing and (2) the additional population growth which is expected to come forward in the urban extensions to Tamworth over the course of the new Local Plan period.
- 7.54 However, it is important to stress that a lack of comparison goods capacity should not mean that the council imposes a moratorium on new comparison goods floorspace in the Borough, particularly in instances where proposals are of an appropriate scale and have potential to enhance the vitality and viability of the network of centres. Applications should be considered on their merits and, where appropriate, compliance with the sequential and retail impact policy tests. Further details are provided in the ‘Strategic Recommendations’ section.

SECTION 8 | CONVENIENCE GOODS SHOPPING PATTERNS & IDENTIFICATION OF NEED

8.1 In this section we set out the quantitative need for **convenience goods retail floorspace in Tamworth Borough**. The approach to the calculation of convenience goods need largely reflects that used to calculate comparison goods need, as set out in the previous section, and accordingly we do not seek to repeat the methodology in detail. The analysis set out in this section should be read alongside the retail capacity tabulations for convenience goods at **Appendix 2**. In common with the comparison goods forecasts in the previous section, it is advised that longer-term forecasts (i.e. those beyond the next ten years) are considered indicative and should be subject to further review and update during the Plan period. The forecasts are for 'main foodstore' need and does not include small-scale/specialist local convenience goods shopping.

Survey area definition and population growth (Step 1a)

8.2 Please refer to the explanation in **Section 7** of this report in respect of these matters.

Available expenditure in the survey area (Step 1b)

8.3 Experian identify a 'per capita' spend (spend per head) on convenience goods for each of the eight survey zones, which are shown in Table CV2 of Appendix 2. This shows that per capita spend on convenience goods ranges from £2,491 in zone 3 (Tamworth South) to £2,840 in zone 8 (Lichfield), with an average per capita spend across the survey area of £2,649, almost identical to the current UK average of £2,621.

8.4 Experian advise that per capita spend on convenience goods will not be subject to the same levels of growth as comparison goods. Experian forecast a decline in per capita spending on convenience goods for the period 2022-2026, as personal spending recalibrates after the significant growth in convenience goods spending seen during the Covid-19 pandemic and associated lockdowns. From 2026 to 2030, Experian forecast that per capita growth will remain static, with a minor uptick of 0.1% per annum for the remainder of the study period to 2040³¹. It is reiterated that longer term growth rates beyond 2034 are considered indicative, however the general trend is that there will likely be only limited growth in convenience goods spending over the course of the Council's new Plan period.

8.5 As with comparison goods shopping, it is necessary to make an adjustment to the baseline Experian figures to allow for SFT to be removed from the retail capacity forecast. This exercise is set out at **Table CV3 of Appendix 2**. The proportion of total spend which has been deducted is derived from the household survey results and is then adjusted for future years in line with rates of UK average SFT growth based on forecasts set out in Experian's Retail Planner Briefing Note 21, as summarised in **Table 8.1**.

8.6 Online shopping for convenience goods has historically had lower levels of take-up than for comparison goods shopping, but the evidence from the household survey is that it currently (2024) accounts for an average of 11.5% of total convenience goods spend across the survey area, just over double the UK average identified by Experian of 5.2% in RP21³². This means therefore that online shopping for convenience goods acts as a greater claim on total spend across the survey area than across the UK as a whole.

³¹ Experian currently only project expenditure growth as far as 2040.

³² Experian figure excludes online shopping transactions which are 'store based', i.e. processed through a local branch of a foodstore.

8.7 If Experian’s UK average SFT growth rates are applied to the current survey area average figure of 11.5%, it means that by the end of the study period at 2040, SFT could account for up to 13.7% of total convenience goods spend for residents in the survey area.

Table 8.1 Convenience goods SFT adjustments

	2024 (study base year)	2029 (interval year)	2034 (interval year)	2040 (interval year)
UK average – Experian Retail Planner 21 Feb 2024)	5.2%	6.3%	7.0%	7.4%
Change from previous interval period	-	1.10%	0.70%	0.40%
Survey area average with growth from ERP applied	11.5%	12.6%	13.3%	13.7%

Source: household survey results & Experian Retail Planner Briefing Note 21 (RP21). As Experian only set out projections to 2039, we have applied a 0.1 percentage point per annum change for the period 2039-40.

8.8 By applying the population forecasts to the per capita expenditure (with the adjustments for SFT applied), we can establish the total amount of spending which is currently available to residents of the survey area, and how much this is expected to increase over the course of the study period to 2040. This exercise is also set out in **Table CV3 (Appendix 2)**. Table CV3 shows that, having made allowance for SFT, convenience goods spend in the survey area is currently (2024) £577.3m, and this forecast is to increase to £587.4m by 2034 (+£16.7m), and indicatively to £605.8m by 2040 (+£28.5m).

Shopping patterns in the survey area (Step 2)

8.9 Convenience goods shopping is a more localised activity – a type of shopping where residents are more likely to use the facilities close to their home, rather than actively seek to travel a longer distance to visit a particular store. Consequently, it means that catchments typically retain a greater proportion of convenience goods market share than for comparison goods, notwithstanding the fact that Tamworth Borough does also benefit from relatively good expenditure retention levels in the latter.

8.10 The total convenience goods market share which each convenience goods shopping destination draws from the survey area is shown in the final column of **Table CV5a of Appendix 2**. It shows that 64.9% of available convenience goods expenditure is retained within the survey area (known as the ‘retention rate’), which in the context of the discussion in the previous paragraph can be considered relatively low. However, this overall figure is skewed by the fact that zone 5 has very limited foodstore provision and the majority of residents in this zone look outside the survey area (mostly to foodstores in Swadlincote) for their convenience goods shopping. Zone 7 (Sutton Coldfield) is also noted to have a lower retention rate, as a number of the large foodstores which serve the Sutton Coldfield area sit just outside the survey area boundary.

8.11 The retention rate for the four zones which comprise Tamworth Borough are, however, significantly stronger and suggest that most residents do not look to destinations beyond the Tamworth area for their convenience goods shopping. Zones 1 and 2 (Tamworth West and Tamworth East respectively) have retention rates over 90%, whilst zones 3 and 4 (Tamworth South and Fazeley respectively) have slightly lower retention rates but

still sit above 85%. The convenience goods retention rates for each zone are summarised in **Table 8.2**; broadly speaking we are satisfied that that these shopping patterns are sustainable.

Table 8.2 Convenience goods retention rate by zone

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2024	94.4%	93.3%	88.0%	86.7%	39.4%	67.8%	46.2%	66.4%

Source: Table CV5a, Appendix 2.

8.12 Unlike for comparison goods shopping, there is relatively little merit in looking at aggregate shopping patterns across the survey area, given the more localised nature of convenience goods shopping. Therefore, we focus our analysis on the shopping patterns of the individual survey zones, and within this, the survey zones which falls wholly or partly within Tamworth Borough; this exercise is set out in **Table 8.3**. As with the comparison analysis in the previous section, the shaded boxes indicate where a store has a 'dominant' market share (30%+ from any individual zone) or 'secondary' market share (10-30% from any individual zone).

Table 8.3 Most popular convenience goods shopping destinations by zone (Tamworth Borough zones only)

Zone number	Zone name	Most popular convenience goods shopping destination (2024) (%)	2 nd -Most popular convenience goods shopping destination (2024) (%)	3 rd -Most popular convenience goods shopping destination (2024) (%)
1	Tamworth West	Sainsbury's, Tamworth (18.3%)	Morrisons, Gungate, Tamworth (15.9%)	Asda, Tamworth (15.5%)
2	Tamworth East	Sainsbury's, Tamworth (13.9%)	Morrisons, Wilnecote (13.2%)	Aldi, Glascote (10.0%)
3	Tamworth South	Morrisons, Wilnecote (25.1%)	Asda, Tamworth (13.2%)	Aldi, Glascote (11.3%)
4	Fazeley	Sainsbury's, Tamworth (20.0%)	Asda, Tamworth (18.6%)	Aldi, Ventura (15.6%)

Source: household survey results

8.13 The key message from Table 8.3 is that residents across all four of the Tamworth zones benefit from access to a variety of convenience shopping facilities; this can be evidenced by the fact that no single foodstore in any of the four zones has a 'dominant' market share from its local zone. The Sainsbury's store at Ventura Park Road is the most popular main food shopping destination for residents in three of the four Tamworth zones but exerts much less of an influence over residents in the south of the town, where the Morrisons store in Wilnecote attracts over 25% of the market share from residents in this zone.

8.14 As we have identified previously, Tamworth town centre is unusual in that there are no large foodstores located centrally within the town centre. The Morrisons store at Gungate, on the very northern edge of the town centre,

captures 15.9% of the market share from residents in zone 1. The Aldi store at Saxon Drive, again on the periphery of the town centre boundary, attracts relatively modest market shares with a maximum of 6.7% from zone 4.

- 8.15 **Table 8.4** shows the ranked overall turnover of the main foodstores in the Tamworth area (zones 1-4). It confirms that the Sainsbury's store at Ventura Park is overall the most popular convenience goods shopping destination, drawing £41.9m of convenience goods spend from residents in the survey area, followed by Morrisons at Wilnecote (£38.3m) and Asda at Ventura Road (£36.3m).

Table 8.4 Summary of turnovers of existing foodstores in Tamworth Borough

Rank	Foodstore	Convenience goods turnover from survey area 2024 (£m)
1	Sainsbury's, Ventura Park	41.9
2	Morrisons, Wilnecote	38.3
3	Asda, Ventura Road	36.3
4	Aldi, Glascote	20.4
5	Aldi, Ventura Park	18.1
6	Aldi, Saxon Drive	11.5
7	M&S, Ventura Park	10.2
8	Morrisons, Gungate	9.3
9	Lidl, Wilnecote / Tame Valley	9.3
10	Lidl, Bolebridge Street	5.9

Source: Table CV5a, Appendix 2

- 8.16 It is important to note that many of the larger foodstores in Tamworth do not just serve residents in the Borough, but also pull in spend from across the wider survey area. For example, the Sainsbury's at Ventura Park draws 42% of its turnover from zones 5-8, and captures spend from each of the eight survey zones. The equivalent figure for Asda at Ventura Road is 37%, and for Morrisons at Wilnecote is 31%. The large foodstores in Tamworth therefore play an important role in supporting convenience shopping patterns from a wider hinterland. The foodstores at Ventura Park Road are particularly well placed in this respect given their easy access from the A38 / Tamworth Bypass.

Assessment of trading performance (Step 3)

- 8.17 **Table CV6 of Appendix 2** sets out an overview of trading performance of convenience goods floorspace in Tamworth Borough, to establish whether this floorspace can be considered to be trading in line with 'benchmark' levels (i.e. company averages for national operators), or whether stores are 'overtrading' (performing at above average levels) or 'under-trading' (performing at below average levels).
- 8.18 The extent of 'overtrading' is then factored into the quantitative need tabulations, working on the principle that overtrading floorspace can, in theory, equate to pent up demand for additional provision. On average across the Borough, the analysis in Table CV6 identifies these 'main' foodstores are trading with an aggregate convenience goods sales density (turnover per sq.m) of approximately £11,581 per sq.m, which can be considered a strong sales density and an indication that convenience goods floorspace in the Borough is generally trading well. However, the sales density identified by the trading performance from the household

survey results is fractionally below the 'benchmark' sales density (based on operator average turnover per sq.m) of £11,924 per sq.m meaning that, collectively, foodstores in the Borough are slightly 'under-trading' compared to UK average. However, the difference in performance can overall be considered marginal.

8.19 Table CV6 of Appendix 2 also sets out an analysis of the trading performance of the individual foodstores in the Borough. The final column of Table CV6 shows the difference between the 'benchmark' trading performance (which is calculated by applying the net convenience goods sales area of the store, to the company average turnover per sq.m for convenience goods sales), and the 'actual' turnover, which is derived from the household survey results as set out in Table CV5a of Appendix 2 (for 2024). The analysis is broken down by survey zone. It can be seen that:

- In zone 1, the net position is one of marginal under-trading. The Aldi and Farmfoods stores in the town centre appear to be trading strongly, although the Morrisons store at Gungate is identified as under-trading by approximately -£1.2m against company benchmark levels. The Lidl store at Bolebridge Street (not within the town centre boundary) is also identified as under-trading, by approximately -£2.9m.
- In zone 2, the small Co-Op and Tesco Express stores are both identified as trading slightly below average.
- In zone 3, the net position is one of over-trading. The Morrisons store at Glascote is trading at approximately £8.8m above average, and Aldi at Glascote trading at £6.1m above average. However, the new Lidl store at Tame Valley is shown to be under-trading by approximately -£6.2m.
- In zone 4, the foodstores around Ventura Park are experiencing mixed trading performances. Whilst the Sainsbury's, M&S and Aldi stores are all trading above average (albeit not significantly so), the Asda store is shown to be quite significantly under-trading. The Asda store is the largest foodstore in the Borough with a net sales area of 7,526 sq.m, and therefore its 'benchmark' turnover is extremely high; it is possible in this instance the store is possibly too large for the company's optimum trading, which may also reflect the introduction of concessions such as Decathlon within the store, for which we have made allowance in our assessment.

8.20 With regards to the above discussions, it is important to note that the identified financial overtrading of floorspace should not be considered a particular cause for concern, unless it is resulting in qualitative compromises to the performance of the floorspace, e.g. excess queuing for car parks, shelves needing to be constantly replenished during trading hours and so on. Indeed, in the case of convenience goods floorspace within defined town centres, a strong-performing foodstore will likely be resulting in higher levels of linked trips spending with other retailers and operators in the town centre, supporting its overall vitality and viability. Therefore the overtrading of existing floorspace should not, in most circumstances, by itself represent a 'need' for additional development.

Other inputs into the quantitative convenience goods needs assessment

'Commitments' for new convenience retail floorspace

8.21 As set out in the previous section, it is necessary to deduct 'commitments' for new retail (class E) floorspace which has been permitted but was not trading at the time of the household telephone survey undertaken in support of this study. These commitments will thus act as a 'claim' on the future amount of floorspace which needs to be planned for. We have reviewed commitments data provided by the Council and are not aware of any commitments for new convenience goods floorspace which require inclusion in our quantitative assessment.

Sales efficiency

8.22 The following sales efficiency rates have been applied for the convenience goods capacity forecasts, based on forecasts set out in RP21; as can be seen sales efficiency growth is expected to be minimal throughout the

duration of the Plan period, meaning there is limited scope for the improved sales performance of existing floorspace to act as a 'claim' on the need for additional convenience goods floorspace.

Period	2024-25	2025-26	2026-30	2030-40 [^]
Sales efficiency rate used	-0.1%	0%	0.2% per annum	0.1% per annum

Source: Experian Retail Planner Briefing Note 21 [^]Experian do not project sales efficiency growth beyond 2040. Longer term forecasts should be considered indicative.

Floorspace data

- 8.23 The convenience goods floorspace data which we incorporate into our modelling has been drawn from a range of data sources, including IGD, Experian Goad, commercial property websites and the Council's own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

Identification of convenience goods capacity

- 8.24 Having considered all of the above matters, **Table 8.5** sets out a summary of the quantitative 'need' for new convenience goods floorspace which the Council should plan for in its new Local Plan period. We have assumed that new convenience goods floorspace will achieve a turnover of £11,500 per sq.m (at 2024), which reflects the fact that current trading performance of foodstores in Tamworth does sit marginally below operator 'benchmark' levels. This sales density will improve fractionally over the course of the period to 2040 in line with the growth rates set out in the section 'sales efficiency', above.
- 8.25 As with the comparison goods capacity forecasts, we advise that forecasts become increasing open to margins of error over time and should be refreshed over the Plan period, and on this basis forecasts beyond 2034 should be considered indicative. The forecasts are again based on a 'constant market share' approach. It should be noted that the figures in **Table 8.5** are cumulative.

Table 8.5 Estimated convenience goods floorspace need for Tamworth Borough, 2024-40

Interval year	2029	2034	2040*
Estimated convenience goods floorspace requirement (sq.m net, rounded)	-1,500	-1,600	-1,400

Source: Table CV8, Appendix 1 *forecasts for 2040 should be considered indicative.

- 8.26 **Table 8.5** shows that there is no requirement for additional convenience goods floorspace over the period to 2034, with our capacity modelling identifying an oversupply of convenience goods floorspace of -1,600 sq.m net by 2034, reducing slightly to an indicative figure of -1,400 sq.m net by 2040.
- 8.27 As per previous advice it is considered that these figures should be subject to review in due course, and needs beyond 2034 should only be considered indicative. As per the comments on comparison goods needs in the previous section, the lack of identified capacity should not mean that the council imposes a moratorium on new floorspace in the Borough, particularly in instances where proposals are of an appropriate scale and have potential to enhance the vitality and viability of the network of centres. Applications should be considered on their merits and, where appropriate, compliance with the sequential and retail impact policy tests.

SECTION 9 | COMMERCIAL LEISURE ASSESMENT

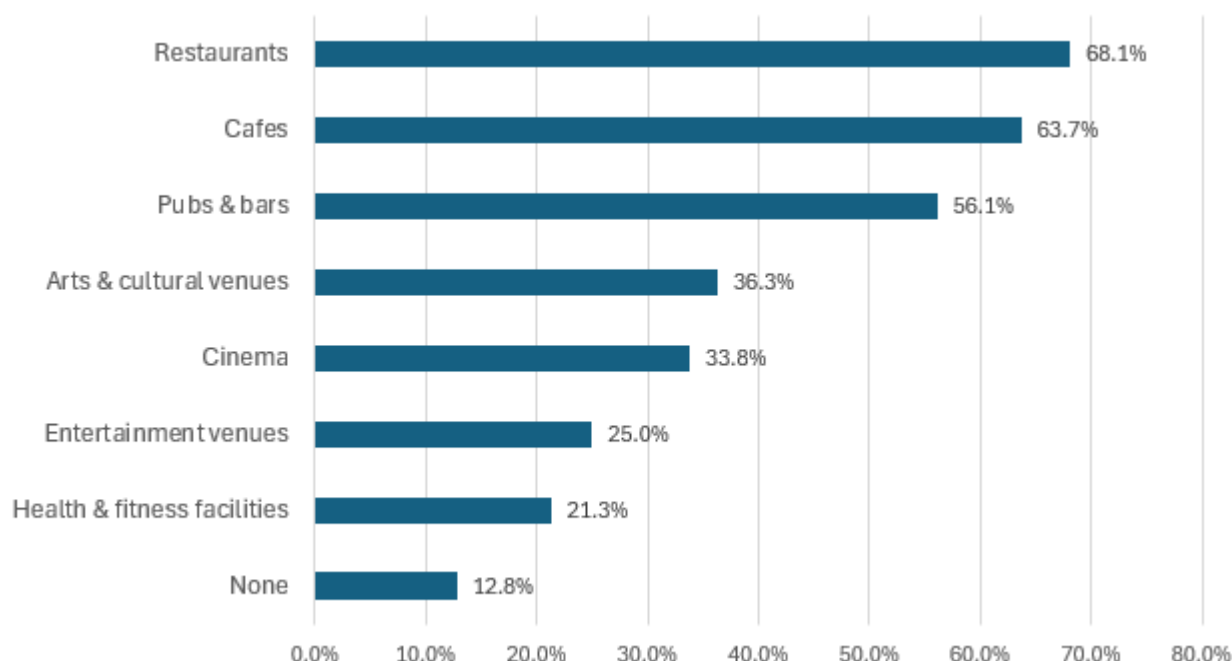
- 9.1 This section of the report considers the current provision of commercial leisure uses in the survey area, including patterns of visits to restaurant, café, cinema, entertainment venues and cultural facilities, and identifies any qualitative ‘gaps’ in the provision of these facilities. The results are informed by our desktop assessment of Tamworth town centre, as well as the findings of the household telephone survey which was carried out in support of this study.
- 9.2 The commercial leisure sector is becoming a more significant contributor to the vitality and viability of town centres at all levels. This is because many town centres are finding an over-supply of floorspace traditionally used for retail purposes, as changing patterns of consumer behaviour (and specifically the growth of online retail) have reduced demand for ‘bricks and mortar’ retail floorspace. At the same time, interventions such as the introduction of class E have provided opportunities for a broader range of sectors to step in and make use of this surplus floorspace stock. We expect that the commercial leisure sector will continue to make an increasing contribution to the overall ‘offer’ and vitality of town centres over the course of the Council’s new Local Plan period.
- 9.3 A healthy and varied commercial leisure sector can deliver significant benefits to town centres, including:
- Providing additional reasons for residents and visitors to visit a centre;
 - Improving the overall ‘offer’ of the centre;
 - Increasing the length of time (and amount they spend) in a centre through supporting linked shopping trips;
 - Increasing the ‘activity hours’ of a centre, beyond traditional retail hours and into the evening; and
 - Reducing vacancy rates.
- 9.4 Our health check of Tamworth town centre has identified that, in broad terms, the commercial leisure offer in Tamworth town centre sits slightly below the UK average in terms of overall representation (accounting for 23.0% of units in the town centre compared to a UK average of 25.8%). However, we have also identified that in qualitative terms, the food & beverage offer in the town centre is relatively narrowly-defined in scope. A further constraint is that some of the town centre’s key leisure assets, e.g. the Odeon cinema, are peripherally-located, meaning their scope to make an active contribution to the wider vitality and viability of the town centre is more limited.
- 9.5 In the context of this, in the remainder of this section we identify current patterns of usage of different types of commercial leisure activity as identified by the household telephone survey, before assessing the potential growth in commercial leisure spend which could come forward over the Council’s new Local Plan period.

Overall patterns of commercial leisure visits across the survey area

- 9.6 We have identified the patterns of leisure / cultural visits undertaken by residents in the survey area, based on the findings of the household telephone survey undertaken in support of this study. Figure 9.1 shows that the most popular activity for residents in the survey area is visiting restaurants (68.1%) followed by going to cafes (63.7%), going to pubs/bars (56.1%), visiting arts and cultural venues (36.3%), going to cinemas (38.3%), going to entertainment venues (25.0%) and attending health & fitness facilities (21.3%). 12.8% of the household respondents stated that they do not take part in any commercial leisure activities.
- 9.7 We will discuss each of these categories in further detail below, focussing our analysis on those parts of the survey area which fall wholly or partly within Tamworth Borough, namely zone 1 (Tamworth West); zone 2 (Tamworth East); zone 3 (Tamworth South) and zone 4 (Fazeley), as well as capturing whether destinations in Tamworth draw any ‘market share’ from any parts of the wider survey area. We also provide an analysis of

centres and individual venues outside of the Borough which draw significant amounts of market share from respondents to the survey that are situated within Tamworth Borough.

Figure 9.1 Types of commercial leisure activity undertaken by survey respondents



Source: household survey results

Visits to restaurants

	Most popular	2 nd -most popular	3 rd -most popular
Destination (aggregate market share from survey area)	Lichfield city centre (20.5%)	Tamworth town centre (14.9%)	Sutton Coldfield town centre (13.0%)

Source: household survey results

- 9.8 The household survey results identified visiting restaurants to be the most popular commercial leisure activity for residents in the survey area, with 68.1% of respondents saying they undertake this. The survey results indicate that Tamworth town centre is the second popular destination for visiting restaurants across the survey area, accounting for 14.9% of visits across the survey area. The most popular destination for visiting restaurants across the survey area is Lichfield city centre, which has an aggregate market share of 20.5%.
- 9.9 Lichfield draws ‘market share’ from across the whole of the survey area, including those survey zones covering Tamworth. It draws 20.6% of the market share from residents of zone 1 (Tamworth West), 13.6% from zone 2 (Tamworth East), 15.7% from zone 3 (Tamworth South) and 9.4% from zone 4 (Fazeley). We consider these to be generally strong market shares, and from our review of the offer in Lichfield city centre it appears that its restaurant / dining offer could potentially be considered more varied and more upmarket than that of Tamworth’s.
- 9.10 Tamworth town centre also draws market share from across the survey area, and its market shares can overall be considered reasonable despite, in qualitative terms, the offer of the centre potentially offering scope for improvement. It attracts a market share of between 25.5% and 36.8% from its four ‘local’ zones (zones 1-4), which can be considered acceptable, but by contrast Lichfield attracts a peak market share of 63.8% from its ‘local’ zone, zone 8, suggesting that in Lichfield more residents are dining out locally than is the case with

Tamworth. An improved variety of offer in Tamworth town centre would offer scope for these local retention rates to be improved and some 'claw back' of market share from other locations to be achieved.

- 9.11 It is also significant to note that the Ventura Retail Warehousing does not feature prominently in the patterns of visits to restaurants, attracting a peak market share of 7.0% from zone 1. Positively, this is enabling other locations, including the town centre, to capture more of the market share.
- 9.12 Sutton Coldfield draws the third-highest aggregate market share of visits to restaurants, although it has relatively limited influence over the Tamworth zones (zones 1-4), with the exception of claiming a 15.6% market share from zone 4 (Fazeley). Its 'local zone' retention rate is, at 35.9%, comparable with the peak market share achieved by Tamworth from its local zones. Birmingham city centre captures an aggregate market share of 6.3% from the survey area, and draws a 9.7% market share from zone 2 (Tamworth South), as well 9.2% from zone 6 and 9.0% from zone 7.
- 9.13 There are a number of other locations that capture market share from a more localised catchment rather than across the survey area as a whole. For example, Atherstone town centre captures a 14.5% market share from its local zone (zone 6), and the village of Appleby Magna captures a market share of 13.5% from zone 5.

Visits to cafes

	Most popular	2 nd -most popular	3 rd -most popular
Destination (aggregate market share from survey area)	Tamworth town centre (23.9%)	Lichfield city centre (17.6%)	Sutton Coldfield town centre (14.0%)

Source: household survey results

- 9.14 63.7% of respondents to the survey stated they undertake this type of commercial leisure activity. Tamworth town centre performs more strongly in terms of the market shares it captures from the survey area compared to restaurants (as discussed above), capturing an aggregate of 23.9% of the market share from residents in the survey area and is the most popular destination for visiting cafes overall. The second most popular destination is Lichfield city centre (17.6%) followed by Sutton Coldfield (14.1%). In this regard, it is considered that Tamworth town centre is performing strongly; again despite our health check identifying that, in qualitative terms, there is scope for improvement in the range/quality of the offer in the town centre in this respect.
- 9.15 Across the Tamworth zones, Tamworth town centre accounts for 49.7% of visits to cafes in zone 1; 43.4% of zone 2; 46.5% of zone 3; and 39.6% of zone 4. As the most popular destination for visiting cafes in the wider survey area, Tamworth town centre draws good amounts of trade from residents outside of the Borough, including 22.5% from zone 5, 23.4% of zone 6 and 11.1% of zone 7. Overall, we consider this to represent a strong performance in terms of market share.
- 9.16 The Ventura Retail Warehousing attracts higher market shares for cafes than for restaurants. It attracts 19.5% of the market share from zone 1, 21.5% of zone 3, 12.8% of zone 4 and 9.8% of zone 6, despite the offer of the retail warehousing being, in comparative terms, relatively limited: there are two Costa Coffee shops as well in house cafes contained within the Sainsbury's supermarket and the M&S.. These provide an ancillary offer to the main function of the Ventura Retail Warehousing area as a retail destination.

Visits to pubs/bars

	Most popular	2 nd -most popular	3 rd -most popular
Destination (aggregate market share from survey area)	Tamworth town centre (19.4%)	Lichfield city centre (15.7%)	Sutton Coldfield town centre (13.6%)

Source: household survey results

- 9.17 The household survey identified this as being the third most popular leisure activity, with 56.1% of respondents stating they undertake this type of commercial leisure activity. Tamworth town centre is the most popular destination for visiting pubs and bars, accounting for 19.4% of the total market share across the survey area. Lichfield city centre is the second most popular destination accounting for 15.7%, followed by Sutton Coldfield town centre.
- 9.18 From the Tamworth zones, Tamworth town centre attracts a market share of 56.5% of zone 1, 39.7% of zone 2, 36.4% of zone 3 and 33.5% of zone 4, therefore securing over one-third of the market share from each of the local survey zones. We consider this to represent a reasonably strong position (particularly from zone 1), but again one with scope for some improvement, as there is again some evidence of leakage of market share to Lichfield city centre from zone 1 (14.3%) and zone 4 (11.4%). Qualitatively, it would appear that the offer of Lichfield in this sector is more diverse than that of Tamworth, which is quite heavily reliant on traditional pubs. Venues such as The Spiritualist and The Wine House in Lichfield city centre, for example, can be considered to offer a different proposition to the evening economy offer, and there are relatively few examples of comparable equivalents in Tamworth. Venues in Tamworth such as The Tamworth Tap – a microbrewery on Market Street – are helping to diversify the offer of the town centre away from traditional pubs, but there is considered scope for further diversification of the offer of the centre in this respect.
- 9.19 It is also worth noting that visits to pubs are also a more localised activity than other types of commercial leisure activities, and many local centre and local villages across the survey area have local pubs. Therefore whilst there is a critical mass in Tamworth town centre, there is competition for spend with these more local facilities, and the household survey results identify a wide range of local villages that each capture small amounts of market share in this category.

Visits to arts & cultural venues

	Most popular	2 nd -most popular	3 rd -most popular
Destination (aggregate market share from survey area)	Birmingham city centre (34.6%)	Lichfield city centre (15.9%)	Tamworth town centre (9.2%)

Source: household survey results

- 9.20 Visiting arts and cultural venues such as theatres, museums or art galleries was recorded as the fourth most popular leisure activity of participants of the household telephone survey, with 36.3% of respondents stating that they took part in at least one of these cultural activities. The most popular location most visited for going to the theatre, museum or art gallery was Birmingham city centre, which captures just over one-third of all market share in this sector. Such a trend reflects the fact that many types of facilities which fall within this category – concert venues, museums, art galleries and larger theatres – tend to be concentrated in larger/regional cities from where a large catchment can be accessed. Tamworth can, accordingly, be expected to fall within the natural catchment of a higher-order centre such as Birmingham for these type of facilities.
- 9.21 Birmingham's offer in respect of this can be considered strong. Whilst 20.7% of respondents did not identify any specific venue within the city centre which they visit, other respondents specifically mentioned the Birmingham

Rep Theatre, the Hippodrome Theatre (which itself attracted almost 10% of responses to the question), the Alexandra Theatre, the O2 Academy live music venue, and Birmingham Museum and Art Gallery. Other key locations for arts and culture in the city centre include the Birmingham Symphony Hall, which occupies a prominent position in the historic Centenary Square, and the Ikon contemporary art venue. This offer is relatively accessible to residents in the survey area; for example Tamworth to Birmingham takes under 20 minutes by train or approximately 40 minutes by car.

9.22 The relatively easy access which residents of the survey area have to the cultural offer of Birmingham is considered positive; Tamworth, as a smaller centre with a more limited catchment, cannot be expected to have an offer which compares with that of Birmingham. In the town centre, the principal cultural venue is the Tamworth Assembly Rooms which is a performing arts theatre that has been recently renovated. The theatre accounts for 21.8% of the market share from zone 1, 14.9% of zone 2, 10.6% of zone 3 and 11.4% of zone 4. The Assembly Rooms also draws in some limited market share from outside of the Borough, including 6.1% of zone 5 and 8.6% of zone 6, but for the most part its catchment appears fairly localised.

9.23 Lichfield city centre's cultural offer draws a slightly higher aggregate market share from across the survey area, accounting for 15.9% of the market share. Most of this market share can be attributable to the Garrick Theatre in the city centre, which also draws market share from Tamworth residents, and in the case of zones 2 and 4, attracts a higher market share than the equivalent in Tamworth, the aforementioned Assembly Rooms (a comparative analysis of the market share of the two venues is set out at **Table 9.1**). A further 4.7% of the aggregate market share is accounted for by unspecified other arts and cultural uses in the city centre.

Table 9.1 Comparison of market share between Tamworth Assembly Rooms and Lichfield Garrick Theatre

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Assembly Rooms	21.8%	15.0%	10.7%	11.4%	6.1%	8.6%	-	0.9%
Garrick Theatre	19.7%	16.1%	2.7%	18.9%	1.6%	-	5.8%	20.9%

Source: household survey results

Visits to cinemas

	Most popular	2 nd -most popular	3 rd -most popular
Destination (aggregate market share from survey area)	Odeon Luxe, Tamworth (53.3%)	Vue, Star City, Birmingham (8.4%)	Red Carpet Cinema, Barton-under-Needwood (6.9%)

Source: household survey results

9.24 Going to the cinema is cited as being the fifth most popular leisure activity for participants of the household telephone survey, undertaken by 38.3% of respondents to the survey. Given the presence of a large cinema in Tamworth — the Odeon Luxe cinema on the edge of the town centre at Bolebridge Street, it is surprising that the proportion of respondents who state that they visit the cinema is not higher. Whilst every catchment area is different, we have found from past experience that catchments with cinema provision in them tend see between 40 and 50% of residents visit the cinema facilities.

- 9.25 The Odeon Luxe is a multiplex cinema of the type usually found on out of town retail and leisure parks, but in Tamworth is located on the south-eastern side of the town centre (within the town centre boundary³³). However, the building occupies an island site located between the busy Ankerdrive and Bolebridge Street roads, with the River Anker to the south, and is therefore fully cut off from the wider retail and commercial offer of the town centre. The cinema was the subject of a full refurbishment by Odeon in 2019 and is now a 'Luxe'-branded cinema, with a total of 10 screens.
- 9.26 As the only major cinema within the survey area, the Tamworth Odeon captures the majority of visits for those respondents who stated they do visit cinema facilities, attracting an aggregate market share of 53.5%. Across the Tamworth zones, the Odeon accounts for 61.9% of cinema visits from zone 1, 70.9% of zone 2, 75.1% of zone 3 and 84.3% of zone 4. The cinema also draws a significant amount of trade outside of the Borough, accounting for 49.8% of visits from zone 5, 45.3% from zone 6, 35.2% from zone 7 and 51.6% from zone 8. These can be considered strong market shares.
- 9.27 We would anticipate that market shares from the Lichfield area (zone 8) can be expected to reduce in the future following the opening of the four-screen Everyman Cinema in the city centre, as part of the redevelopment of the former Debenhams store. There is currently no cinema in Lichfield.
- 9.28 The relative dominance of the Tamworth Odeon over patterns of visits to cinemas means there are no other venues / destinations which capture significant 'market share'. The Vue cinema at Star City in Birmingham attracts an aggregate 8.4% market share from the survey area, including a 10.8% market share from zone 3 (Tamworth South) and a 17.0% market share from zone 7 (Sutton Coldfield). The Cineworld cinema in Burton-upon-Trent attracts a 11.2% market share from zone 1 (Tamworth West), and the Odeon in Swadlincote attracts a significant market share from zone 5 (Rural North). Neither of these cinemas has a significant influence beyond the aforementioned zones. The Odeon Luxe in Nuneaton also draws a 24.6% market share from zone 6 (Atherstone).
- 9.29 An unusual development which sits just outside the catchment to the north is the 'Red Carpet Cinema and Café Bar', which is located at Barton Marina, to the east of the small village of Barton-under-Needwood, south of Burton-upon-Trent. This is a small two-screen cinema with an accompanying café-bar, but its strong connection to the wider road network (it is located just off the A38) means that it attracts noteworthy market shares from parts of the survey area, drawing a 19.7% market share from zone 1 and a 21.5% market share from zone 8; residents in both of these zones are well-placed to access the A38.

Visits to entertainment venues

	Most popular	2 nd -most popular	3 rd -most popular
Destination (aggregate market share from survey area)	Tamworth town centre (including NAMCO / Snowdome) (47.0%)	Birmingham city centre (7.5%)	No other venues / destinations attract >5% market share

- 9.30 The phrase 'entertainment venues' comprises family-based activities such as ten-pin bowling, as well as 'competitive socialising' such as indoor golf and escape rooms, and more traditional activities such as bingo. Visting entertainment venues is the sixth most popular leisure activity, with 25.0% of respondents stating they participate in this activity. Tamworth town centre contains an unusually strong presence of venues which falls within this sector, including the NAMCO Funscape gaming centre (which features bowling alley, arcade and a soft play area), and the Snowdome indoor skiing centre (which also contains an ice rink and a gym). The presence of facilities such as this translate to Tamworth having an aggregate market share from the survey

³³ As defined by the adopted Local Plan (2016).

area of 47.0%, i.e. accounting for almost one in two visits to all entertainment venues for residents in the survey area. This can clearly be considered a positive performance.

9.31 Of the 47.0% being directed to venues in Tamworth, the following individual market shares were identified:

- 24.9% of respondents stated they visit the NAMCO Funscape in Castle Park. This venue draws market share from across the survey area, including a 57.5% market share from zone 2 (Tamworth East), 51.9% market share from zone 4 (Fazeley), and market shares over 40% from zones 3 and 6. It is therefore evidently a popular and well-used facility on the basis of the survey results, and significantly it pulls in visitors from outside Tamworth – as well as the high market share from zone 6, it also draws 19.0% market share from zone 5 and 15.5% from zone 7.
- 7.7% of respondents stated they visit the Snowdome. It does not have the same catchment-wide draw as the NAMCO facility but draws a market share of between 10 and 15% from five of the eight survey zones.
- 11.4% of respondents stated they visit Tamworth town centre but did not identify a particular venue.

Visits to health and fitness facilities

9.32 Visits to health and fitness facilities are generally more localised patterns of leisure activity, and, coupled with the fact that a relatively small proportion of respondents visit these facilities (only 21.3% of all survey respondents), there is little merit in considering survey area-wide patterns of visits. At the local level however, the following patterns of activity for residents in the Tamworth zones:

- In zone 1 (Tamworth West), the Bannatyne Health Club at Bittescote attracts a market share of 32.3%, followed by Snowdome Fitness, Gym & Spa (15.4%). 25.9% of respondents simply identified that they visit health and fitness facilities in Tamworth town centre;
- In zone 2 (Tamworth East), the market share is largely split between the same two facilities, with the Snowdome facility drawing a higher market share (35.0%) than Bannatyne (24.6%);
- In zone 3 (Tamworth South), the market share is again largely split between Bannatyne (36.9%) and Snowdome (21.9%); and
- In zone 4 (Fazeley), the Bannatyne facility draws a high market share of 44.7%, with Snowdome attracting 11.4% of the market share.

9.33 Since the 2011 Study, there has been a significant expansion in national gym operators such as The Gym Group, PureGym and AnyTime Fitness. These offer members relatively low monthly memberships and have grown substantially in popularity in recent years. Tamworth has presence from both The Gym Group (within the NAMCO Funscape) and PureGym (at Jolly Sailor Retail Park), although surprisingly neither of these facilities were identified in the household survey as attracting significant market share. Given their wider popularity and the relatively limited other provision in the Tamworth area currently, we anticipate that the popularity of these facilities may have been under-reported in the household survey. In qualitative terms the opening of these 'budget' health and fitness facilities enhances the offer in the Tamworth area. It is noteworthy that there are few facilities within the town centre itself however, and this provides an opportunity moving forwards which will help diversify the leisure offer in the centre and also attract footfall outside of retail trading hours.

Expenditure growth in the commercial leisure sector

9.34 In the same manner as in the retail capacity figures set out in the preceding sections of this report, Experian also provide per capita spend data for spending relating to leisure uses. Within this, we focus on spending of three sub-categories of leisure spending, which are those most directly related to 'main town centre uses', namely 'cultural services', 'recreation and sporting services' and 'restaurants and cafes'. A full discussion of the types of leisure activity which fall within each of these categories is discussed below.

- 9.35 By applying the Experian population projections we have adopted for the retail capacity forecasts to the latest per capita expenditure data on leisure spending, we can obtain an indication of the likely growth in leisure spending available to residents of the survey area. Whilst not all of this available expenditure can, by default, be used to support the development of new commercial leisure facilities in the survey area – particularly because leisure spending is often undertaken with holidays, day trips, special occasions and so on and therefore may in part be spent outside the survey area – it provides an indication of the scope for additional development to be supported, thus supporting our qualitative observations in respect of the performance of the centres set out above.
- 9.36 As noted above, Experian provide per capita leisure expenditure data on the following categories of commercial leisure spending:
- ‘Cultural services’ – this includes spending on cinema, theatre, museums, live music/entertainment, nightclubs, bingo, and TV subscriptions such as Netflix.
 - Spending on this type of leisure service ranges from £373 per person, per annum in zone 2 (Tamworth East) to £461 per person, per annum in zone 8 (Lichfield) (all figures at 2022).
 - The average per capita spend across the survey area is £414 per person, per annum which is fractionally above the UK average of £408.
 - ‘Recreation and sporting services’ – this includes spending on admission to spectator sports (e.g. watching football matches) and subscriptions to sports/social clubs.
 - Spending on this type of leisure service ranges from £154 per person, per annum in zone 2, to £215 per person, per annum in zone 8.
 - The average per capita spend across the survey area is £182 per person, per annum; this is fractionally below the UK average of £201.
 - ‘Restaurants and cafes’ – this includes spending in both restaurants and cafes, and also includes spending on ‘alcoholic drinks consumed outside the home’ (i.e. in pubs and bars) and on take-aways.
 - Spending on this type of leisure service accounts for the majority of residents’ commercial leisure spend (reflecting the national picture in respect of distribution of spending), ranging from £1,478 per annum (zone 2) to £1,916 per annum (zone 8).
 - The average per capita spend across the survey area is £1,659 per person, per annum. This average is £93 lower than the UK average of £1,722.
- 9.37 Per capita spending on commercial leisure has been subject to significant fluctuation in recent years, on account of spending being impacted by Covid-19 and associated lockdowns and restrictions on indoor dining/meeting. Experian forecast (Retail Planner Briefing Note 21 (RP21)) that per capita spend on commercial leisure dropped by 35.8% between 2020 and 2021 for example (associated with the enforced closure of many sectors of the leisure industry on account of the Covid-19 pandemic) but has subsequently ‘bounced back’ with a growth in per capita spend of 28.6% between 2021-22 and 21.3% between 2022-23. Such levels of growth largely correct the scaling back in spending which occurred during the pandemic and moving forwards growth in leisure spending is expected to be much more regularised. RP21 forecasts growth in spending of +0.6% from 2025-26, increasing to +1.1% per annum from 2026-2030 before settling back slightly to +0.8% per annum from 2030 onwards.
- 9.38 By applying the average zonal per capita spend on the different types of commercial leisure activity to Experian’s population projections for the survey area, the total ‘pot’ of commercial leisure expenditure available to residents of the survey area can be calculated. The results of this exercise are summarised in **Table 9.2** for the periods 2024-34 as well as over the longer term period to 2040, reflecting the approach of the retail capacity forecasts set out in the previous two sections of the report. As with the retail capacity forecasts, we advise the longer term figures are treated as indicative.

9.39 Full tabulations for each of the commercial leisure sectors are set out **Tables CL3a to CL4** of **Appendix 3**.

Table 9.2 Expenditure growth in key commercial leisure categories in survey area

Sector	Expenditure growth in survey area, 2024-34 (£m)	Expenditure growth in survey area, 2024-40 (£m, indicative)
Cultural services	+£18.9m	+£29.5m
Recreation & sporting services	+£8.4m	+£13.2m
Restaurants and cafes	+£75.4m	+£117.7m
Total	+£102.7m	+£160.4m

Source: Table CL3a, CL3b, CL3c, CL4, Appendix 3. Note that figures are for survey area as a whole.

9.40 Overall, **Table 9.2** shows that spending growth in the commercial leisure sector is expected to increase by £102.7m in the survey area between 2024 and 2034, and indicatively by £160.4m between 2024 and 2040. Almost three-quarters of this growth in commercial leisure spending (73.4%) can be attributable to the restaurants and cafes sector (which also includes other forms of food and beverage premises, such as pubs/bars), suggesting there is considerable expenditure capacity to support additional facilities of this nature across the Borough.

9.41 The growth in spending in this sector presents clear opportunities for the Borough. Our health check assessments have identified that, at least in qualitative terms, there is considerable scope for improvement in the diversity and quality of the ‘offer’ of the Borough in respect of its food and drink offer, and we consider this to present a key opportunity to strengthen the vitality and viability of the town centre. Furthermore, as retail demand decreases, aligned with introduction of class E, it may be reasonable to expect stronger demand for this type of floorspace moving forwards, although this does not appear to have been the case at the current time since class E was introduced in 2020 and our assessment of the diversity of uses in the town centre in 2024.

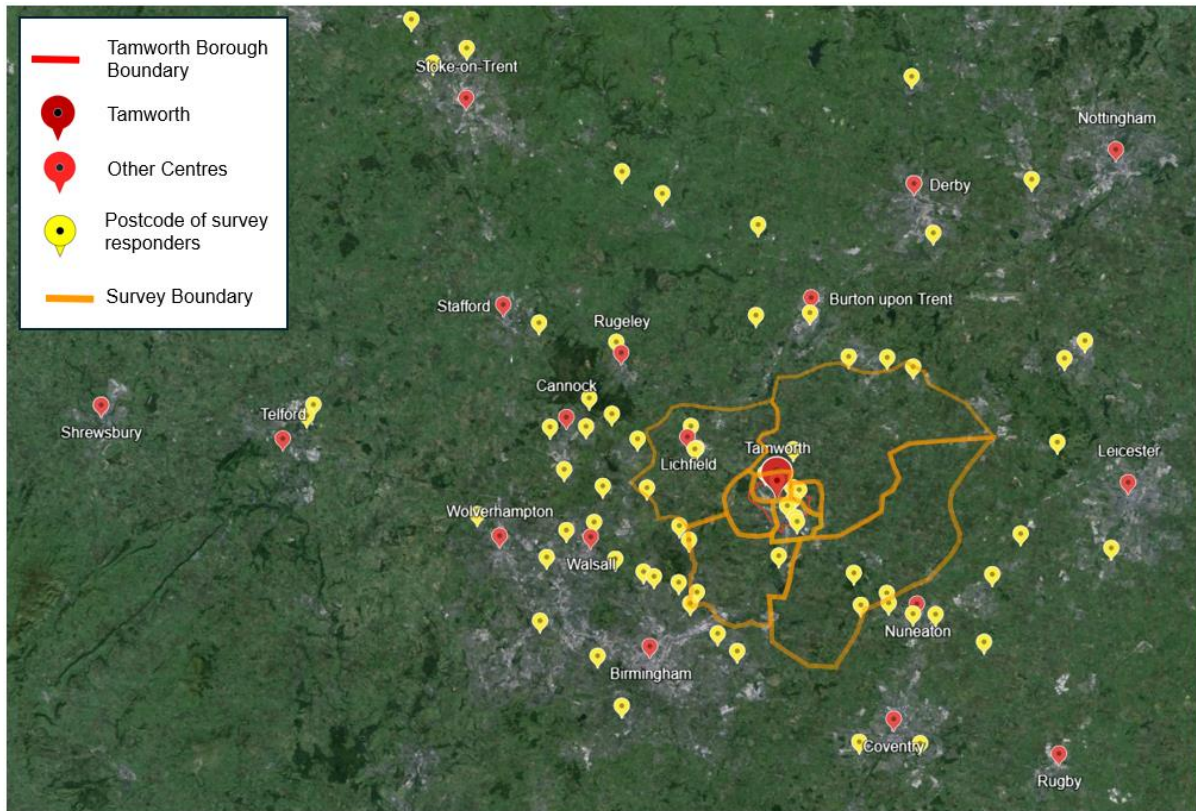
9.42 Growth in the other key commercial leisure sectors is more limited but still substantial, and points to the need that additional facilities in these categories can be supported in the survey area, where market demand exists.

Tamworth Castle

9.43 Our health check assessment of the town centre has highlighted the assets which the Council has adjacent to the town centre, by way of Tamworth Park and Tamworth Castle. Both of these are important assets which can play a crucial role in supporting the long term vitality of the town centre. The Council has recognised this through the programme of works which are currently underway to enhance linkages between the Castle / Park and the wider town centre, as we have detailed in previous sections of this report.

9.44 Tamworth Castle plays a role and function as a key tourism asset for the town. Unlike much of the offer in the wider town centre, the Castle draws visitors from a much wider catchment. This is demonstrated visually in **Figure 9.1**, which shows the postcode origins of visitors to the Castle between March 2024 and July 2024. The data is not exhaustive, as not all visitors to the Castle will have provided this information for data capture. However, as an indication of the extent of its catchment, it is useful as **Figure 9.1** clearly shows that the Castle draws visitors from across the wider West and East Midlands. The data shown on Figure 9.1 does not show visitors that have come from further afield beyond this (in the interests of legible map presentation), but analysis of the survey data shows that the Castle even attracts visitors from overseas.

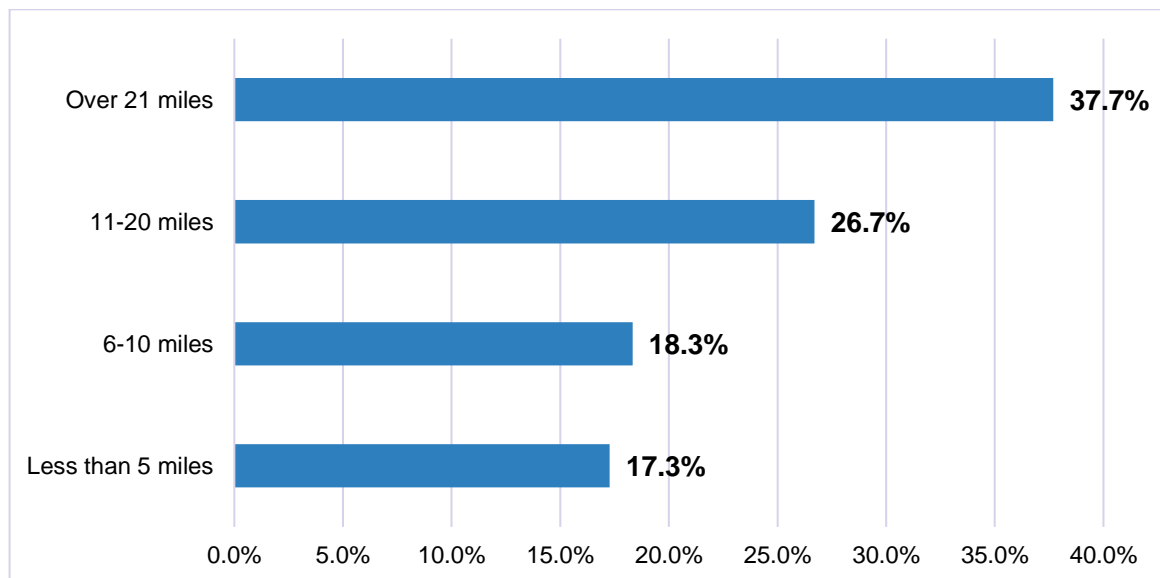
Figure 9.1 Postcode origin of visitors to Tamworth Castle, March-July 2024



Source: Tamworth Borough Council visitor survey data, March – July 2024. Note, postcodes shown are not exhaustive and exclude postcodes/responses from beyond the West Midlands and Leicestershire, Derbyshire and Nottinghamshire.

9.45 **Figure 9.2** breaks the data into travel distances, and shows that over one-third of visitors to the Castle (37.7%) between March and July 2024 travelled over 21 miles to visit, and a further 26.7% travelled between 11 and 20 miles. In total therefore, 64.4% of visitors — almost two-thirds — travel from over 11 miles away. This is a significantly larger catchment than our analysis has identified the shopping catchment of Tamworth town centre to be.

Figure 9.2 Travel distance for visitors to Tamworth Castle, March-July 2024

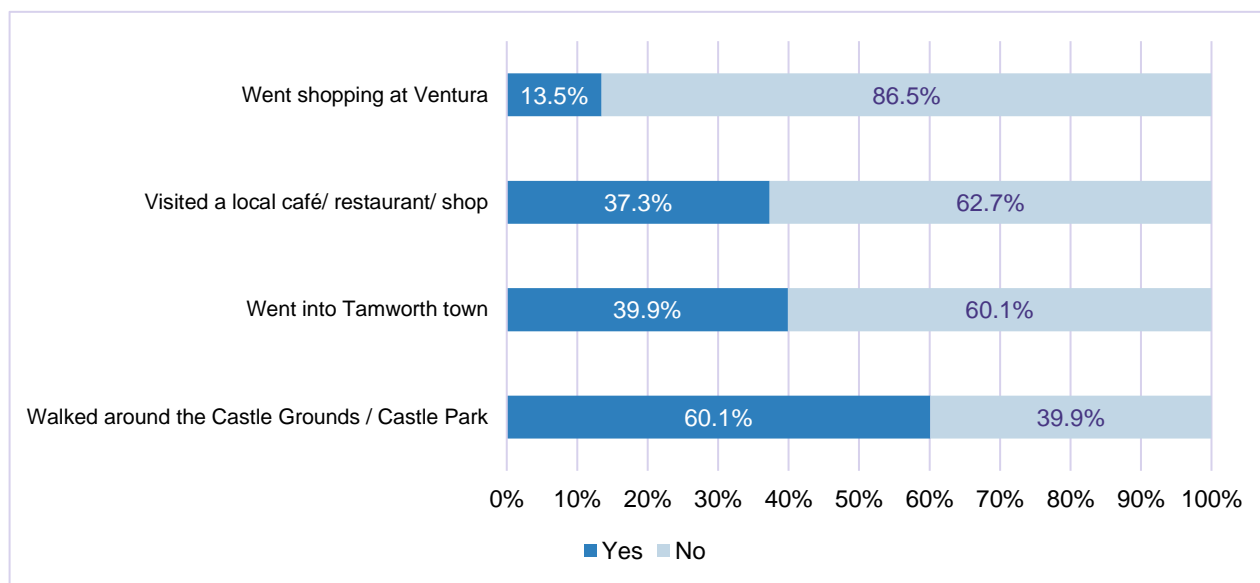


Source: Tamworth Borough Council visitor survey data, March – July 2024

9.46 The Council is, therefore, in a fortunate position of having this important tourism and heritage asset in the town centre. However, current evidence gathered by the Council in the aforementioned survey indicates that many visitors to the Castle choose not to visit the town centre as part of their trip. As shown in **Figure 9.3**, under 40% of visitors to the Castle currently visit the town centre, or any local cafes, restaurants or shops, as part of their visit. Given the close proximity there is clear potential for this to be improved.

9.47 A key challenge for the Council moving forward will, therefore, be to ensure that the wider town centre provides an offer which is able to fully cater to the needs of visitors. This will deliver benefits both in terms of diversification of uses in the town centre, but also enhanced linked trips and dwell time, resulting in more spend overall being captured by the town centre. It would be expected that the proposed works which are underway to ‘open up’ the town centre from the Castle / Park will improve linked trips, but this will need to be supported by qualitative enhancements to the overall ‘offer’ of the town centre relative to the current position.

Figure 9.3 Linked trips undertaken by visitors to Tamworth Castle



Source: Tamworth Borough Council visitor survey data, March – July 2024

SECTION 10 | CONCLUSIONS & RECOMMENDATIONS

10.1 In this final section of the report, and informed in full by the primary and secondary evidence gathered for this study, we set out our concluding comments and pointers towards strategic recommendations which the Council may wish to consider taking forward in their new Local Plan. We provide strategic recommendations on a Borough-wide strategy, as well as specific approaches for Tamworth town centre and the network of local and neighbourhood centres.

10.2 The recommendations we have identified are informed by the following overall conclusions:

- The role and function of town centres is evolving, and town centres will need to have a balanced mix of uses in order to be successful. Recent national and legislative updates provide the market with flexibility to do this, but it needs to be informed by strategic policy where necessary.
- A balanced mix of uses, offering interest and activity at different times of the day, will not only help increase footfall and patronage to a town centre, but also mean that people may spend longer in the centre, or visit more frequently. Tamworth town centre is currently underperforming in this respect, and the need to improve the diversity of the town centre (both in terms of range of uses, and quality of uses within individual ranges) should be considered a priority.
- Retail will still continue to act as a key driver of footfall in town centres, but when experiencing competition as strong as the offer at Ventura, it will not be enough to sustain the long-term vitality of the town centre.
- On this basis, it is strongly recommended that the new Local Plan contains specific policies setting out the Council's policy approach to supporting the long-term vitality of the town centre. This should make reference to supporting the diversification of the offer in the town centre, enhancement of its commercial leisure offer, and enhancement/diversification of its evening economy, and strengthening its tourism role.
- Our analysis has not identified a requirement for significant additional retail floorspace to be planned for over the new Local Plan period, but a small positive need for additional comparison goods floorspace has been identified. These identified needs should be directed towards Tamworth town centre in the first instance in line with established national policy.
- It should, however, be remembered that need forecasts are not a 'ceiling' for development and planning applications for retail and other main town centre uses should be considered on individual merits and, where necessary, demonstrate compliance with retail policy (sequential and retail impact) tests.
- We have not identified a quantitative need for additional convenience goods retail floorspace, but in qualitative terms it is considered there is a case to support provision of a medium-sized foodstore in Tamworth town centre in order to meet a gap in the town centre offer and support its long term vitality and viability.
- Our analysis has forecast significant growth in the commercial leisure sector over the new Plan period. Whilst it is not possible to directly translate this into floorspace requirements, we expect there to be a need to plan for additional provision of this nature. Accordingly, proposals which seek to deliver additional floorspace of this nature should be supported in principle provided amenity, retail policy and other relevant considerations are met. Proposals for additional commercial leisure provision should be directed towards Tamworth town centre.
- The Ventura Retail Warehousing is likely to be the default choice for shopping for many residents of the Borough. Its 'market share' appears to have grown since the Council's last retail study in 2011, and it has a shopper catchment that extends significantly wider than that of the town centre. There have been a number of enhancements to the offer at Ventura since the last retail study, including new floorspace and modernisation of existing floorspace stock, which appears to have cemented and grown its market share.

- It is understood that that much of the Ventura Retail Warehousing floorspace trades as open class A1/E, and in practical terms this limits the scope to which the Council can control its trading impacts vis-à-vis the town centre. However, we would recommend that the Council has clear development management policies in place which resist the creation of smaller-format units at Ventura, i.e. of the type which will more directly compete with the town centre offer.

Strategic approach to town centre & retail

- 10.3 We set out the following recommendations for the general strategic approach to planning for retail and main town centre uses in the Borough over the new Local Plan period to 2043.

Ref	Subject area	Recommendation
TBC01	Strategic approach to retail and main town centre uses	The Council should have regard to the requirements of adopted national policy when developing its retail and town centre policies for the Borough. The NPPF directs the development of retail and other main town centre uses towards town centres in the first instance, and for development outside town centres compliance with the sequential and impact ‘tests’ needs to be demonstrated. Any new applications for retail or other town centre uses on the edge of, or outside of, the defined town centres in the Borough should therefore demonstrate that there are no sequentially preferable sites available, and, for applications which fall above the recommended impact assessment thresholds (see recommendation TBC05) that no ‘significant adverse’ impacts will arise on existing defined centres based on the criteria set out in the National Planning Policy Framework.
TBC02	Retail policy tests	All applications for development of main town centre uses outside a defined primary shopping area are required to demonstrate compliance with the sequential test, irrespective of the quantum of floorspace proposed.
TBC03	Hierarchy of centres	Tamworth town centre should continue to act as the sole ‘town centre’ for the Borough, acting as the Borough’s highest order centre. It should be the focus for applications for main town centre uses. The town centre should be supported by an allocated network of local and neighbourhood centres for which smaller scale development which meets the needs of a localised, walk-in catchment should be supported in principle.
TBC04	Retail warehousing	The Ventura Retail Warehousing (including Ventura Retail Park, Jolly Sailor Retail Park, Cardinal Point Retail Park, and associated foodstores and other standalone retail units), and those elsewhere in the Borough, should be treated under policy as ‘out of centre’, and should continue to be allocated on proposals maps as such, meaning that any applications for development at these locations will need to satisfy retail policy (sequential / retail impact) tests where applicable. As well as Ventura, this allocation should also be applied to the new retail development around Tame Valley (The Range/B&M) and any other locations in the Borough where there are standalone retail warehouses or foodstores not within a policy-defined centre.
TBC05	Impact assessment thresholds	Policy EC1 of the adopted Local Plan identifies the following impact assessment thresholds:

Ref	Subject area	Recommendation										
		<table border="1"> <thead> <tr> <th>Area for Application of Floorspace Thresholds</th> <th>Assessment Required</th> </tr> </thead> <tbody> <tr> <td>Within the out of centre retail parks or Strategic Employment Allocations</td> <td>Over 250 sq.m gross</td> </tr> <tr> <td>Within 400 metres of the boundary of a local centre</td> <td>Over 250 sq.m gross</td> </tr> <tr> <td>Within 400 metres of the boundary of a neighbourhood centre</td> <td>Over 100 sq.m gross</td> </tr> <tr> <td>Any area outside of the town centre</td> <td>Over 500 sq.m gross</td> </tr> </tbody> </table> <p>It is considered that these impact assessment thresholds remain robust. However, in light of the continued challenges to Tamworth town centre's vitality which this study has identified, it is recommended that the threshold figure for 'any area outside of the town centre' is reduced from 500 sq.m gross to 250 sq.m gross, in line with the approach for the out of centre retail parks.</p> <p>The impact assessments should be applicable to all applications for 'main town centre uses' (as defined by the NPPF, Annex 1), not just retail.</p>	Area for Application of Floorspace Thresholds	Assessment Required	Within the out of centre retail parks or Strategic Employment Allocations	Over 250 sq.m gross	Within 400 metres of the boundary of a local centre	Over 250 sq.m gross	Within 400 metres of the boundary of a neighbourhood centre	Over 100 sq.m gross	Any area outside of the town centre	Over 500 sq.m gross
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Any area outside of the town centre	Over 500 sq.m gross											
TBC06	Retail needs	<p>It is recommended that the Council plan for the following retail needs for the period to 2034:</p> <ul style="list-style-type: none"> • Comparison goods: up to 2,700 sq.m net by 2034. • Convenience goods: no identified quantitative need. <p>Quantitative need for the period 2034-43 should be subject to review during the course of the new Local Plan period, due to the uncertainties of long term forecasting.</p> <p>In line with national policy, identified needs should be directed towards Tamworth town centre in the first instance.</p>										
TBC07	Retail needs	<p>The quantitative needs identified in this study are intended as strategic guidance. The need forecasts are not intended to act as a 'ceiling' on new retail development and applications for new development should be considered on individual merits, as well as demonstrating compliance with retail policy (sequential and retail impact) tests, where relevant.</p>										
TBC08	Retail needs	<p>If there are any significant changes in economic circumstances over the course of the Plan period, the Council should instruct a review of retail needs figures.</p>										
TBC09	Development management	<p>In addition to the retail impact thresholds set out above, the council should ensure robust planning policy and development management policies are in place in respect of sites identified as 'out of centre'. This should include:</p> <ul style="list-style-type: none"> • Resistance in principle to further out-of-centre floorspace for main town centre uses, in the context of the current underperformance of Tamworth town centre. • Resistance in principle of sub-division of floorspace at out-of-centre sites where this would create smaller format units comparable to those in Tamworth town centre. • Requirement for a sequential test to be undertaken for applications for sub-division of retail floorspace. • Resistance of the introduction of commercial leisure and other uses on the out of centre sites in principle and requiring any applications for these uses to demonstrate compliance with retail policy tests where applicable. 										

Tamworth town centre recommendations

- 10.4 Our assessment has clearly set out that whilst the current investment by the Council, supported by Future High Streets funding, is highly positive, there will remain a need for a clear strategy to be prepared for the town centre to support its long term vitality. This is likely to move towards the centre becoming a place which can offer more of a contrast to the Ventura Retail Warehousing, making the most of its heritage and open space assets, supporting the development of a healthy and diverse independent sector, and encompassing a wide range of retail, food, drink, services, educational and civic uses.
- 10.5 The town centre currently appears to suffer from poor levels of demand, resulting in a vacancy rate which is above the UK average, and the presence of a number of prominent vacant units in the centre, especially in the Ankerside Shopping Centre. There is, therefore, arguably too much floorspace in the town centre to meet current demand, especially as much of the floorspace is older/more dated stock which is likely to be less attractive to the market. This problem is not unique to Tamworth; it is being seen in town centres at all levels of the hierarchy across the country but appears more prevalent in larger / higher order centres. We note that the Council has recently acquired the Ankerside Shopping Centre and its ownership will be expected to assist with the long term vitality of the town centre.

Ref	Subject area	Recommendation
TTC01	Role and function of town centre	Tamworth town centre should continue to perform its role and function as the highest-order centre in the Borough, and meet a range of retail, leisure and other main town centre uses in order to encourage sustainable patterns of shopping and leisure by the Borough's residents.
TTC02	New retail development	The comparison goods quantitative need which this study has identified should be directed towards Tamworth town centre. Applications which seek to develop further comparison or convenience goods provision (either extensions to existing stores or provision of new retail facilities) may be supported in principle provided that compliance with the retail sequential and impact tests is demonstrated where necessary.
TTC03	New retail development	Aligned to the above, whilst we have not identified a quantitative need, in qualitative terms the Council should explore options for the development of a small to medium sized foodstore in the town centre, as the absence of this is considered a key gap in the overall town centre offer.
TTC04	Vacancy rate	The Council should undertake regular audits of vacant units in the town centre and work with stakeholders and landlords where possible to secure the positive re-use of premises.
TTC05	Vacancy rate	The Council should work with relevant stakeholders to secure the long-term reletting of the large vacant units to quality operators (be that retail or other main town centre uses) which will make a lasting, positive contribution to the vitality and viability of the town centre. Applications which seek to sub-divide the units in question which would assist in meeting the above objective should be supported in principle.
TTC06	Auditing	The Council should consider undertaking a full updated 'health check' of the town centre once the current regeneration works are completed, to establish any early impacts arising. This should be undertaken ideally 1-2 years after all regeneration projects are complete and, where applicable, operational.

Ref	Subject area	Recommendation
TTC07	Diversification	<p>The Council should support in principle (in instances where planning permission is required) proposals to diversify the range of uses in the town centre, and actively seek to progress a strategy which provides support to such initiatives.</p> <p>Particular priorities for diversification are food & beverage uses, cultural uses, and the development of an evening economy more focussed around food / casual dining than bars / pubs. Improvements in the quality of the offer in these sectors would also assist in drawing a broader range of people into the town centre, and also deliver enhancements to the visitor economy. Our assessment has identified that there is significant growth expected to come forward across the commercial leisure sectors, but particularly in the food & drink sector, which will help support the provision of the above recommended enhancements.</p>
TTC08	Heritage and tourism	<p>The Council should continue to invest in capitalising on the heritage and open space assets it has within and adjacent to the town centre, building on the work currently underway to open up the town centre to the Castle and Park. Both of these are significant assets of the town centre which are a point of distinction for the centre. This should be supported by exploring other methods to enhance 'linked trips' between the town centre and Castle / Park, as current evidence shows only a relatively low proportion of visitors to the Castle also visit the town centre as part of their visit.</p>
TTC09	Public realm and placemaking	<p>Tamworth has consistent and attractive public realm throughout much of its centre, which makes a positive contribution to its overall vitality. Continued investment in this, and replacement of public realm as it begins to age, should continue to be a priority throughout the new Plan period. Consideration should be given to mechanisms which will highlight these assets throughout the day, such as uplighting of key / prominent buildings.</p>
TTC10	Existing leisure assets	<p>The Council is in the unusual position of having a number of large commercial assets on the periphery of its town centre — a modern multiplex cinema, the SnowDome, and Namco development. Similar to the recommendations under TTC08, initiatives should be considered which better support the integration of these facilities with the wider town centre offer, and more 'linked trips' to be captured.</p>
TTC11	Markets	<p>The Council should continue to support the market in the town centre, as evidence suggests that it does draw residents in to visit. However, as with the wider town centre offer, there is a need for diversification and improvement in the quality of the offer, and the Council should work with market operators to deliver improvements in this respect. Special / occasional markets (e.g. monthly artisan markets, festive markets, vintage markets, plant & garden markets) will bring visitors into the town centre, but will only be successful if properly marketed.</p>

Local centres recommendations

- 10.6 The Council has a network of local centres and neighbourhood centres which help support sustainable patterns of shopping at the local level. These generally appear to be displaying positive signs of vitality and viability, with a reasonable range of day-to-day facilities, and often other local or neighbourhood centres in close proximity.

Ref	Subject area	Recommendation
TLC01	Role and function	The Council should continue to allocate a network of local and neighbourhood centres in its new Local Plan, in order to provide these locations with appropriate policy support against applications for new commercial development.
TLC02	Role and function	The Council should resist development within or on the edge of local / neighbourhood centres which is not in keeping with their identified role and function – i.e. meeting day to day local shopping and services needs. Applications for development which meets a broader catchment or range of needs should be directed towards Tamworth town centre.
TLC03	New local centres	It is considered there are qualitative gaps in local centre provision in the north-eastern and south-eastern parts of the Borough, south of Amington and in Wilnecote respectively. Consideration should be given to supporting new local centre facilities in these areas to assist in enabling residents' day to day needs to be met in a sustainable manner.

ENDS. For and on behalf of Firstplan, January 2025.

