THE RETAIL GROUP

informed solutions

Shirley Economic Growth Plan

Updated Study Report

Prepared on behalf of

Solihull Metropolitan Borough Council

URBS IN RURE

August 2020

Report Contents

1.0 Introduction to The Retail Group

1.1 Experience and Credentials

The Retail Group is a specialist retail management consultancy that provides informed solutions about the consumers' future needs for a wide range of retail and property clients. The philosophy of our business is "to improve our clients' business through our understanding of shoppers, their shopping habits, retailers and the skills of retailing".

For retail property clients and local authorities, we offer objective and carefully researched retail strategies based on detailed awareness and analysis of national and local retail markets. We ensure that proposed developments target and satisfy the future needs and aspirations of all local consumers.

Our clients appreciate the down-to-earth approach to researching individual centres and our ability to clearly state the reasons for trading in a particular location. Our retail strategies encompass all town centre operators including multiple retailers, independents, service, catering and leisure operators.

We have defined future town centre strategies for over 250 locations covering all sizes and types, from market towns like Morpeth and Frome, to sub-regional towns like Ashford and Livingston, to regional destinations such as Birmingham and Bluewater. Our consumer oriented methodology and approach also enables us to work on iconic locations like Wembley, Greenwich Peninsula and Spitalfields.

Locations we have worked near Shirley include Solihull, Sutton Coldfield, Tamworth, Kidderminster, Cannock, Rugeley, Lichfield, Bromsgrove and Redditch.

2.0 Project Background and Objectives

2.1 Project Background and Approach

The aim of the study is to assist the Solihull Metropolitan Borough Council (SMBC) and its partners to produce an updated Economic Growth Plan for Shirley and an associated action plan, converting the vision for the centre into a strategy for action. This will help SMBC to meet the GBSLEP strategic priority of 'creating stronger conditions for growth', this will enable inclusive growth, and will maximise access to opportunities for residents, businesses and communities in Shirley Town Centre.

The report will identify where areas could be strengthened, or new priorities introduced, based upon the changing nature of the retail environment, recent changes in terms of investments and occupiers within the high street and how Shirley can respond to the recommendations made within the Greater Birmingham and Solihull Strategic Economic Plan and Towns and Local Centres Framework.

The collective desire is to ensure that Shirley Town Centre is a successful, sustainable and appealing place. A town that is right for the future needs of its customer base, their future retail, leisure, social, community and occasion uses. A place that Shirley residents and other customer groups choose to use as well as have-to use.

Our core approach is to examine and understand the future needs of all the potential Shirley consumers, residents, shoppers, workers, visitors, students etc. and to then overlay the views and desires of all stakeholder groups including the existing businesses in and near the town. We will then apply the lessons from our understanding of the trends and future direction for town centres, combined with the lessons from appropriate and relevant benchmark locations.

This will enable us to develop the future vision and economic plan along with an action plan to achieve the future potential for Shirley. The action plan will provide practical actions and initiatives that can be delivered by identified local stakeholders (including identified ambassadors). The action plan will build on the aims set out in the previous economic plan (many of which continue to be relevant) and the ideas set out in the BID proposal.

The findings and identified actions contained in the report will need to be read and actioned in the context of the many wider initiatives that are underway and proposed for Shirley and its surrounding area, including the significant, ongoing housing growth, the enhancements to the A34 corridor and wider environmental improvements.

2.0 Project Background and Objectives

2.2 Project Objectives

The requirements are as follows (as detailed in the study proposal)

- Refresh of the existing 2017 Economic Plan and activities proposed as part of the 2018 BID business plan
- Respond to the diversification of the high street, the changing nature of retail – supporting a buoyant day and night-time, cultural and leisure economy
- Engagement with key groups, identify how to maximise the existing 'civic pride', community involvement, public realm and promotional activities, distinctive quality and character
- Increasing attractiveness of the area, accessibility and maximising opportunities such as events space / use of public realm
- Place marketing and promotional activities, supporting the businesses and community organisations
- Use of digital technologies to increase footfall – including apps, signage and web presence
- Identifying local business and community 'Ambassadors' to lead and support the various strands of activity and the viability of a future Business Improvement District proposal
- Supports inclusive growth in terms of meeting the needs of its various communities and also provides a range of employment opportunities
- Business support activities to encourage business growth, innovation, diversification; new job opportunities that can be supported by the Council's Business Investment Team
- Use and accessibility of community buildings and facilities, linking of green spaces to the high street (particularly Shirley Park) to promote the natural assets of the area and increase footfall.

Covid-19: The Shirley Economic Growth Plan study was commissioned, completed and report submitted prior to the 'Lockdown' of the UK economy in March 2020. However the report's identified conclusions and detailed actions remain valid and implementable post Lockdown. Indeed the need for improvement and recovery actions has increased significantly.

Appendix I contains a further addendum that summarises the recommended actions from The Retail Group that are priorities for delivery post lockdown as the town moves into the future recovery phase and Appendix II contains the Solihull Town and Local Centres Recovery Framework developed by SMBC.

Survey of Town Centre Operators

3.0 Operator Survey

3.1 Overview / Introduction

A bespoke questionnaire was developed for the Shirley Town Centre Business Survey, as contained in Appendix III.

The survey area is as shown opposite, extending from the Iblina Hair and Beauty (in the north) to Early Days School Uniform shop in the south

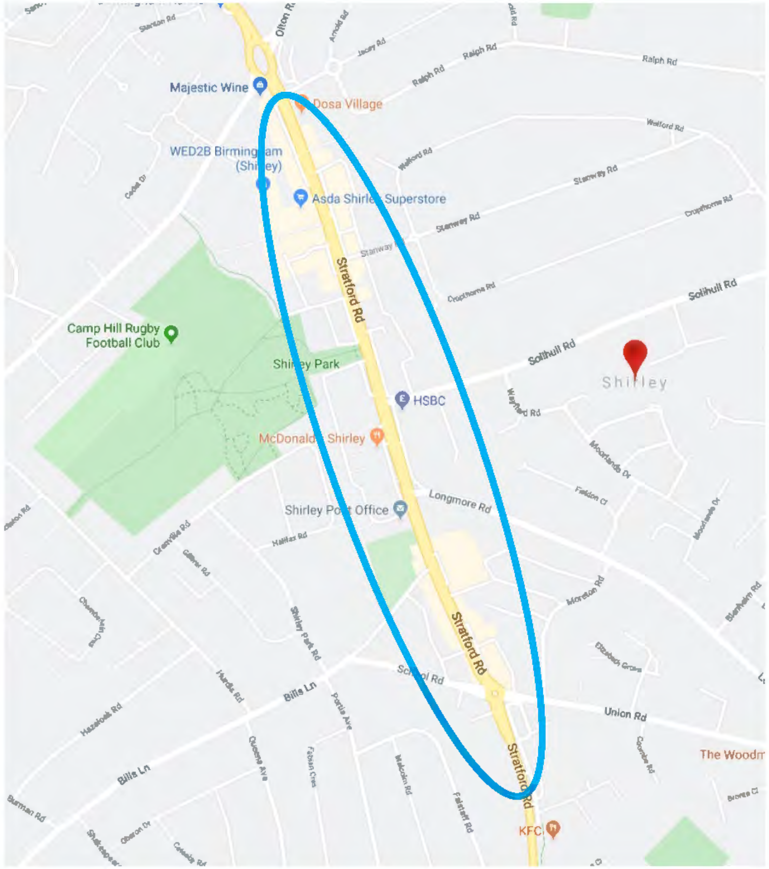
135 surveys were handed out across the extended town centre area on 28 and 29 November 2019.

94 completed surveys were collected the same days, with two extra since received, following two waves of email distribution. Respondents are listed in Appendix IV.

This is a fabulous response, producing an **excellent dataset of 96 respondents.**

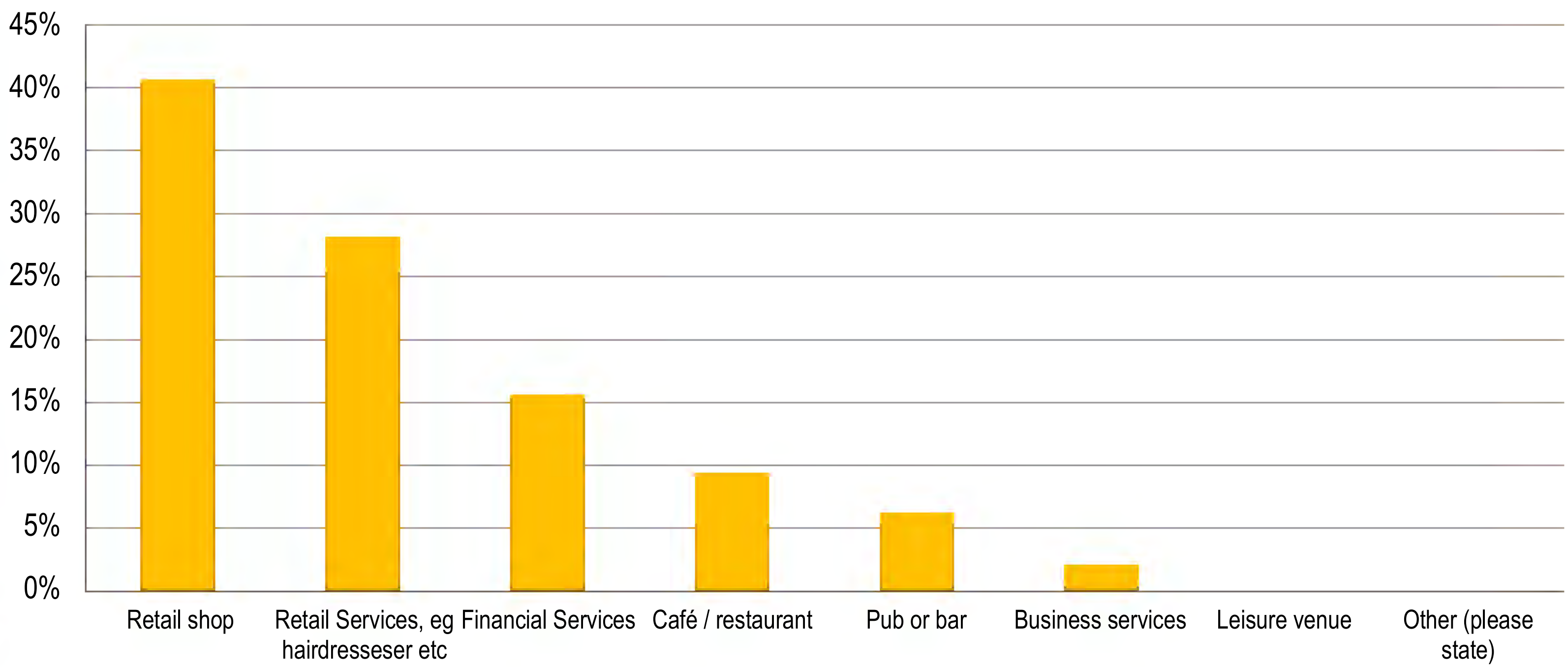
This represents a significant percentage of the current active businesses in the town centre.

Businesses were very supportive of the survey, which is positive indicator in itself.



3.0 Business Type

3.2 Type of Business



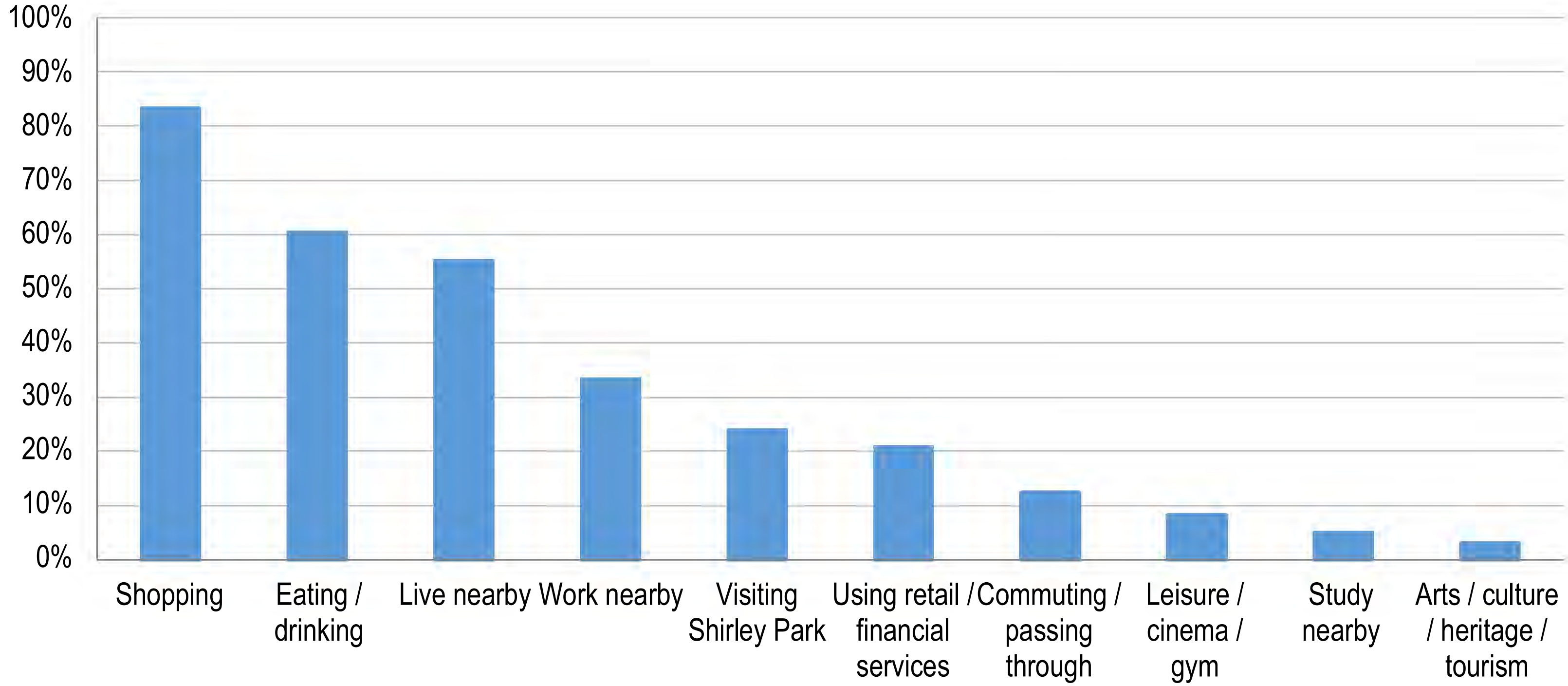
Survey respondents represent a wide variety of business types

40% describe themselves as retail shops; circa 28% are service providers, 15% are financial services and another 15% are F&B (food and beverage) operators

A broad mix of operators reflective of the offer of the town centre

3.0 Reasons for Visiting Shirley Town Centre

3.3 Main Reason for Customers to Visit



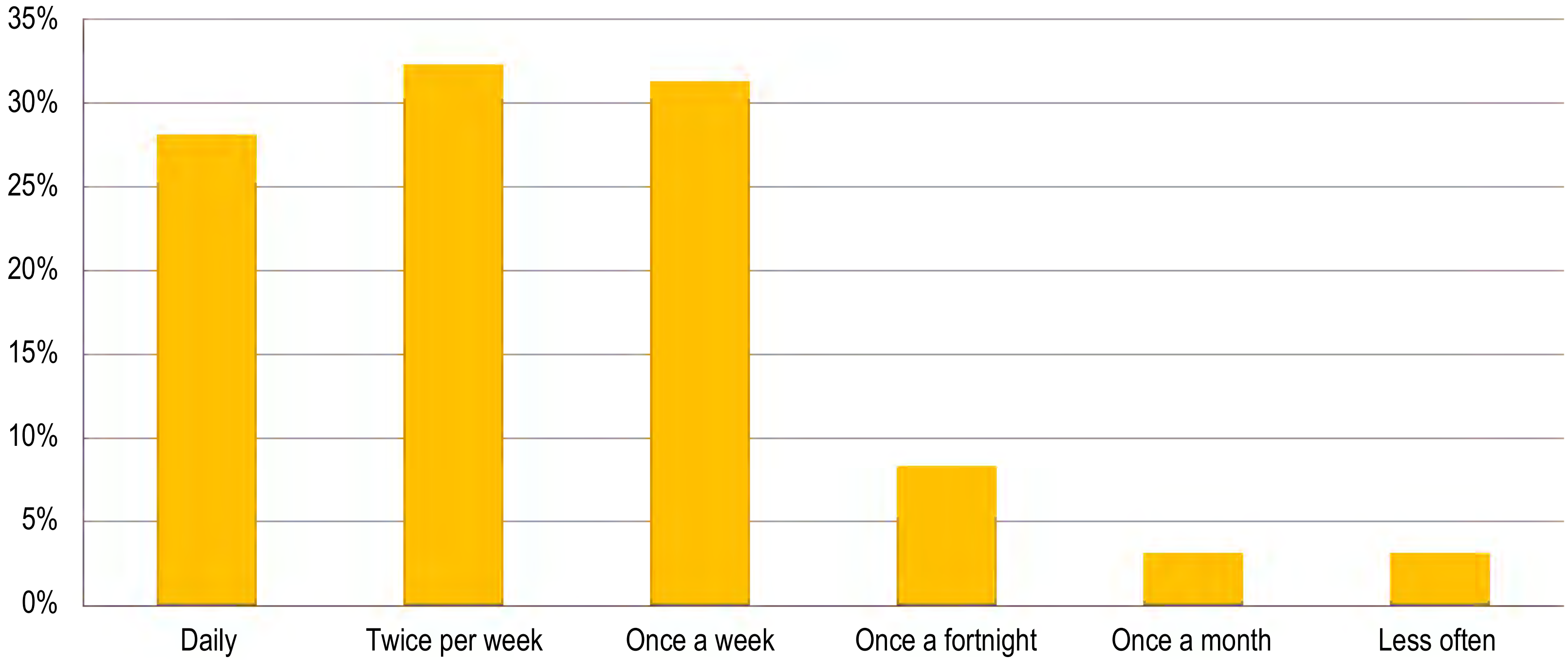
Businesses identify 'shopping' as a main visit driver. Eating and drinking along with live nearby are secondary visit drivers

Working nearby and using Shirley Park are also popular visit drivers

Shirley also benefits from 5 other lessor visit drivers, the town is benefitting from multiple visit drivers

3.0 Operator Survey, Visit Frequency

3.4 Customer Visit Frequency



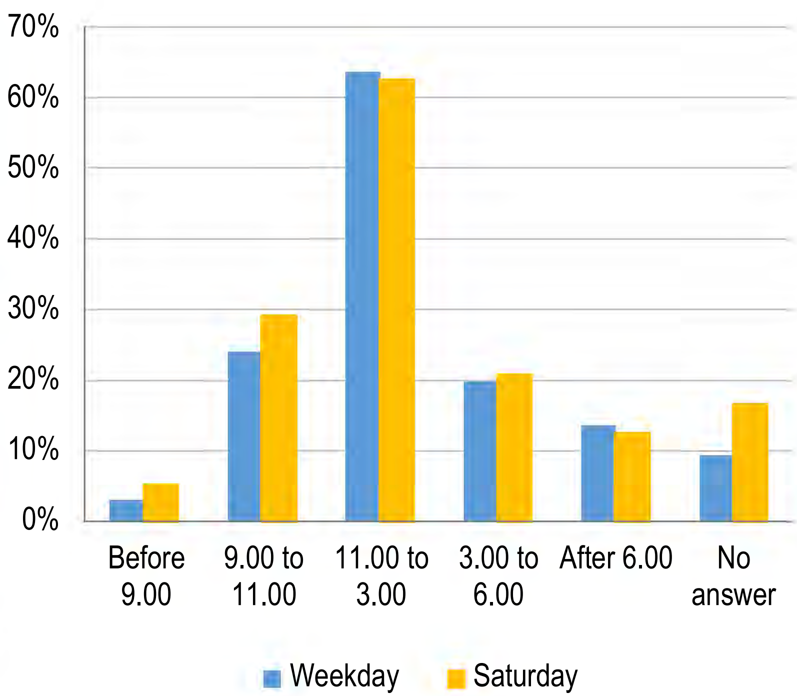
Most retailers (90%) report a visit frequency of at least once a week

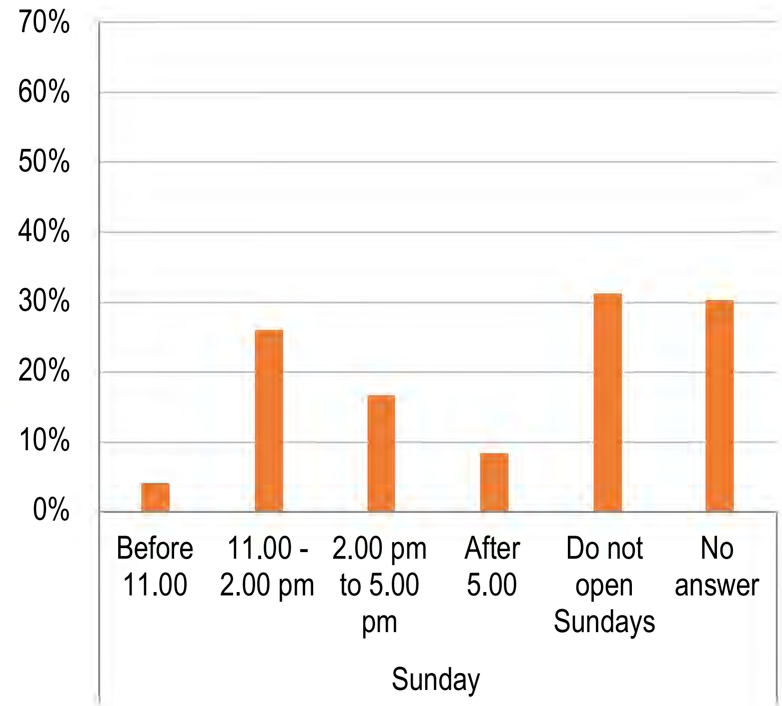
Twice a week or more frequently accounts for circa 60% of visits

A very frequent, loyal customer base

3.0 Operator Survey, Busiest Trading Times

3.5 Busiest Time of Day





Consistent trading patterns for weekday and Saturday

Busy lunch time peak, thereafter morning a little busier than afternoons

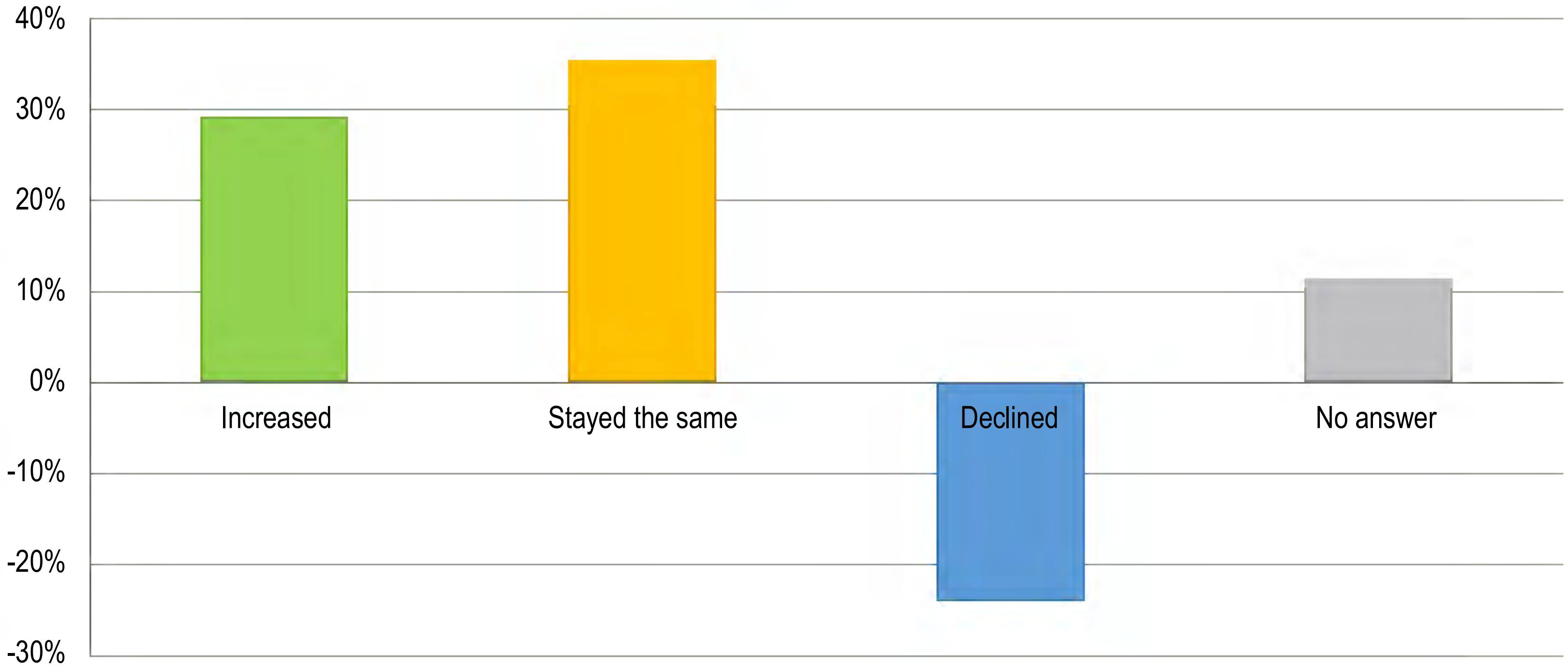
Post 6.00 pm peak for F&B operators

Most businesses do not open Sunday, or didn't answer

Lunch time and pm peaks

3.0 Average Transaction Values

3.6 Trends in Average Transaction Values



A fairly positive trend for average transaction values, with more businesses seeing increases than decreases. Over 55% are level or up on last year.

Average customer numbers per day are 102 and average per week are 462.

3.0 Operator Survey; Strengths of Shirley Town Centre (unprompted)

3.7 Strengths

Operators were given an opportunity to identify their views of Shirley Town Centre's strengths. Those made at lease two respondents were:

Food / drink offer	13	Good transport link	4
Clean and tidy	10	Busy	3
Accessibility	9	Good community spirit	3
Choice / variety of shops	8	Free parking	3
Parking provision	7	Number of bus stops / routes	3
Supermarkets	6	Convenient	2
Shirley Park	5	Cultural Diversity	2
Community feel / Friendly	4	Good street lighting	2
Evening Offer	4	Passing traffic	2

Appendix V contains the strengths identified by single respondents.

A wide variety of strengths identified. No single major strength, a mixture of offer, physical and access strengths.

3.0 Operator Survey; Weaknesses of Shirley Town Centre

3.8 Weaknesses

Operators were also given an opportunity to identify their views of Shirley Town Centre's weaknesses. Those made at lease two respondents were:

Parking provision / availability	17	Not enough shops	3
Lack of shop variety	14	Cost of parking	3
Too many charity shops	13	Inadequate / expensive parking	2
Traffic congestion / flows	12	Not enough independents	2
Rough sleepers	10	Too many restaurants for night businesses	2
Shoplifters / theft / crime	7	Too many appartments being built	2
Safety / Lack of policing	7	Dark Park	2
Too many barbers	4	Signage	2
Lack of anchors / multiples	4		

Appendix VI contains the weaknesses identified by single respondents.

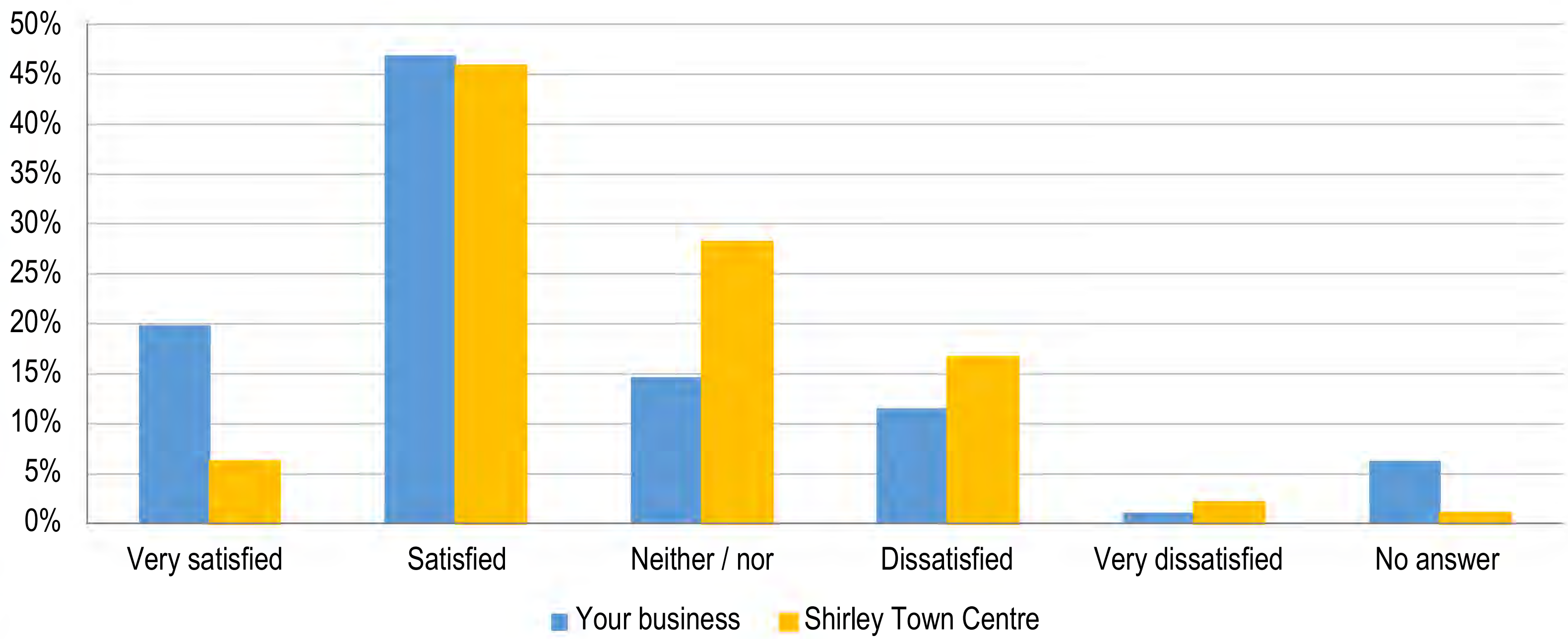
Parking, provision, cost, lack of dominates weaknesses

Lack of choice, variety, focus of charity shops is another key weakness

As is security, ASB, safety and crime

3.0 Satisfaction with Business and Town Centre Operator Survey

3.9 Business Satisfaction Levels



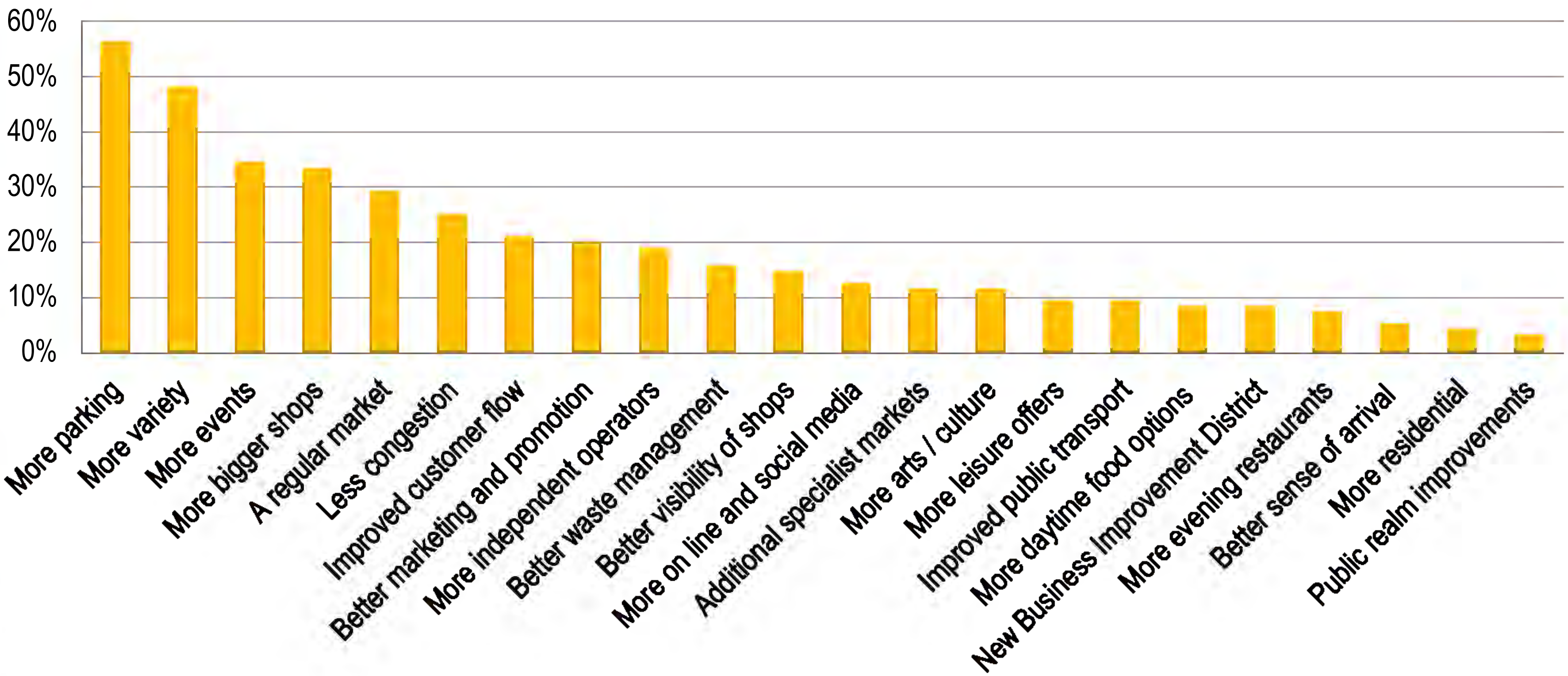
Circa 65% of businesses are satisfied with their performance in Shirley, only 12% are dissatisfied, a 5:1 positive ratio.

Circa 50% are satisfied with Shirley Town Centre, 18% dissatisfied almost 3:1 positive ratio.

A positive picture for trading in Shirley.

3.0 Operator Survey; Priority Improvement Areas

3.10 Town Centre Priority Improvement Areas

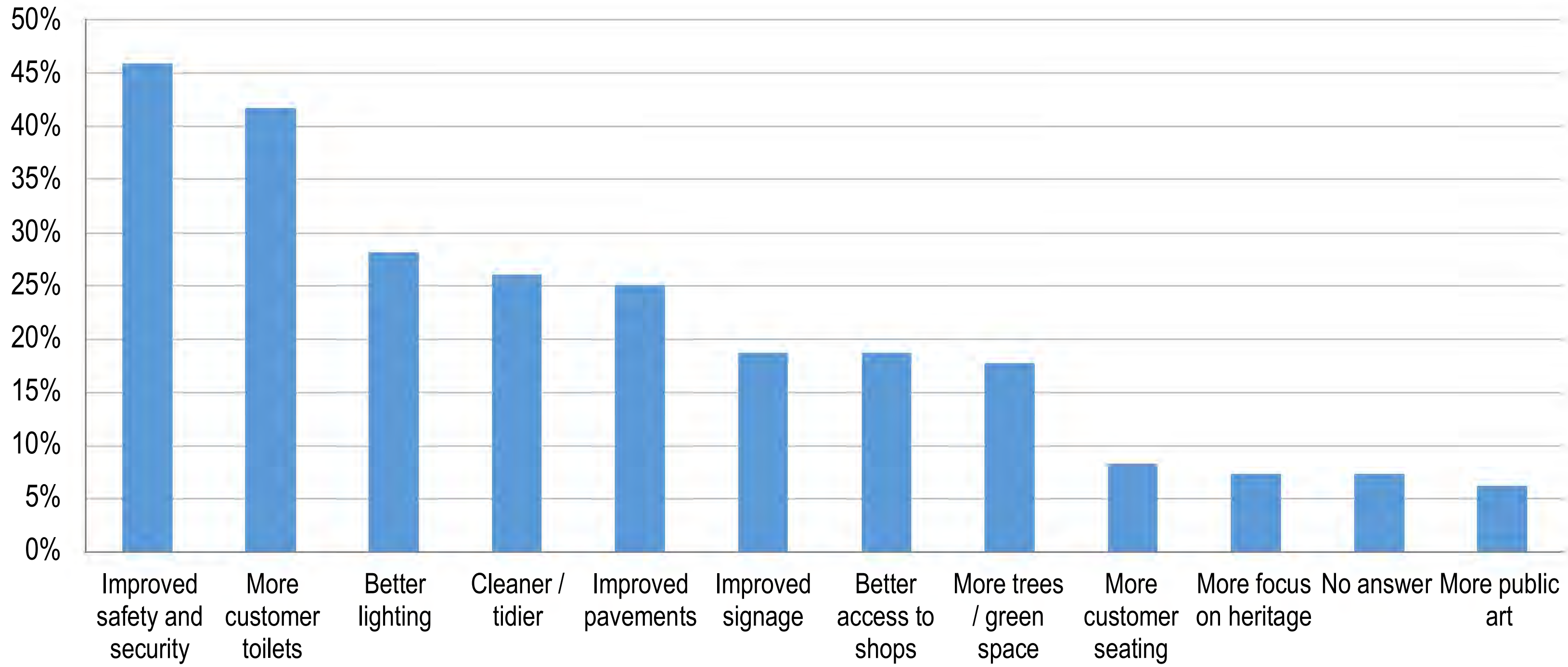


Businesses have identified a lot of areas for improvement, 9 aspects are identified by circa 20% of businesses. Parking, variety, choice, regular market, more promotion, improved customer flow, less congestion all feature.

Another 10 aspects by circa 10% of respondents. Fairly demanding businesses!

3.0 Public Realm Improvements

3.11 Improvements Wanted to Public Realm



Specifically in regards the public realm itself, operators want improved safety and security, and public toilets.

Beyond that they would like Shirley to be cleaner, brighter, easier to use and more green spaces / trees.

3.0 Trading Performance

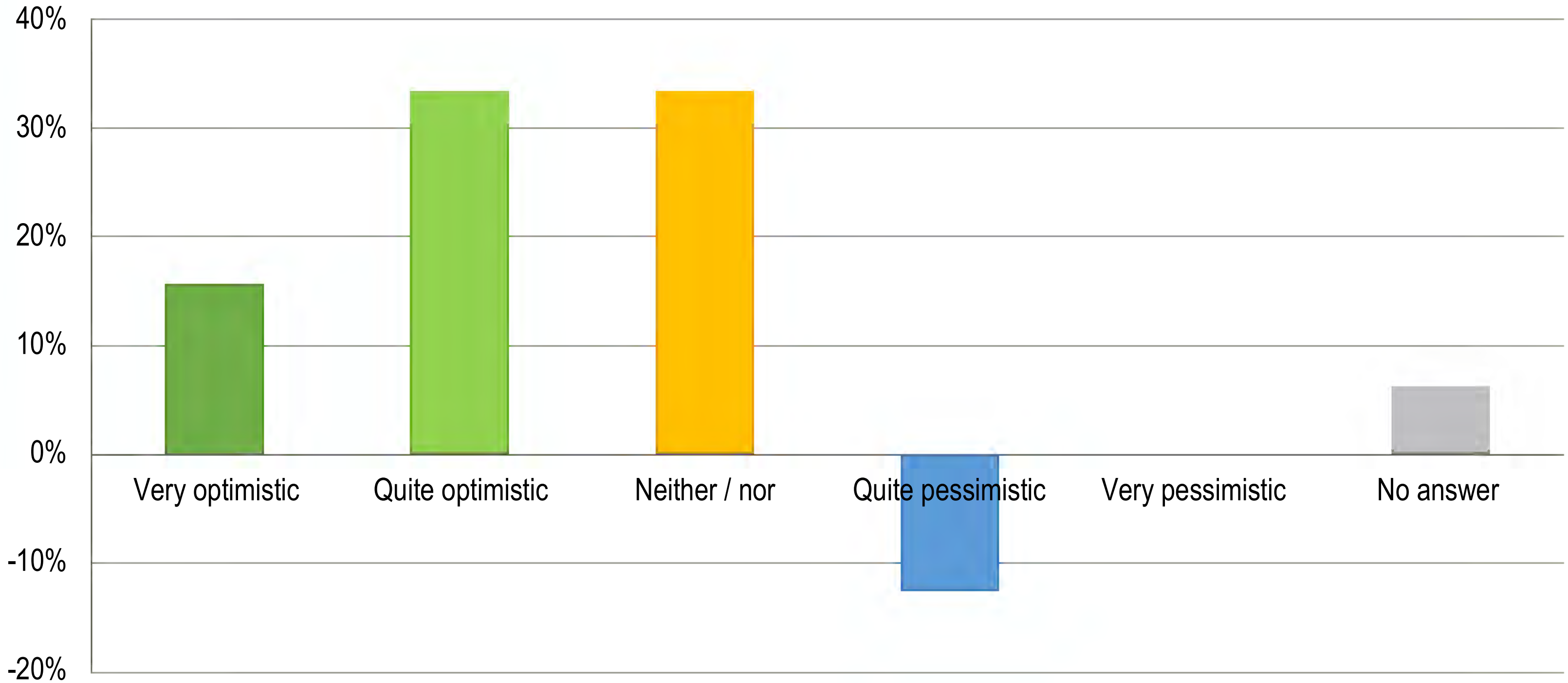
3.12 Year on Year Performance

Very positive response overall. More retailers are ‘up’ than ‘down’.

When ‘up’ and ‘level’ are combined, circa two thirds of retailers are either trading up or level on last year.

3.0 Operator Survey

3.13 Future Optimism



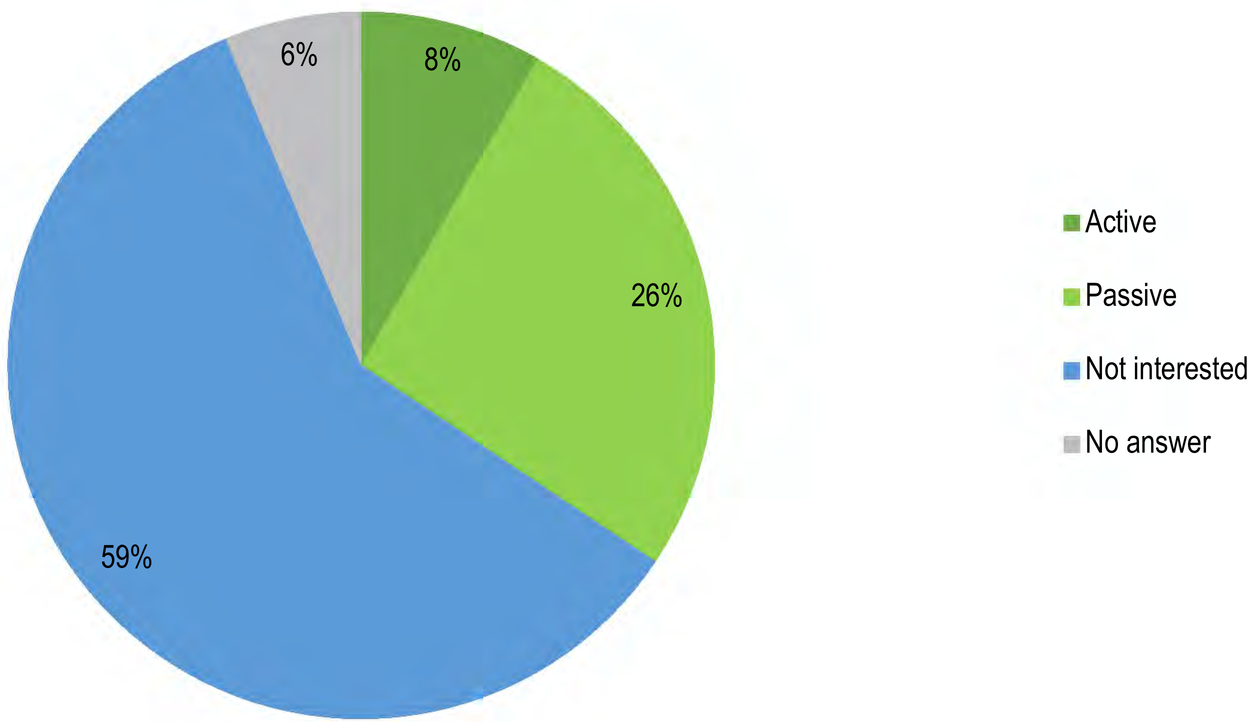
The majority of retailers are positive about the future, with a third unsure.

Only 13% of retailers are pessimistic about the future trading prospects in the town.

This is a very positive finding in the current retail climate.

3.0 Town Centre Management Organisation

3.14 Interest in joining / participating in a Town Centre Management Organisation

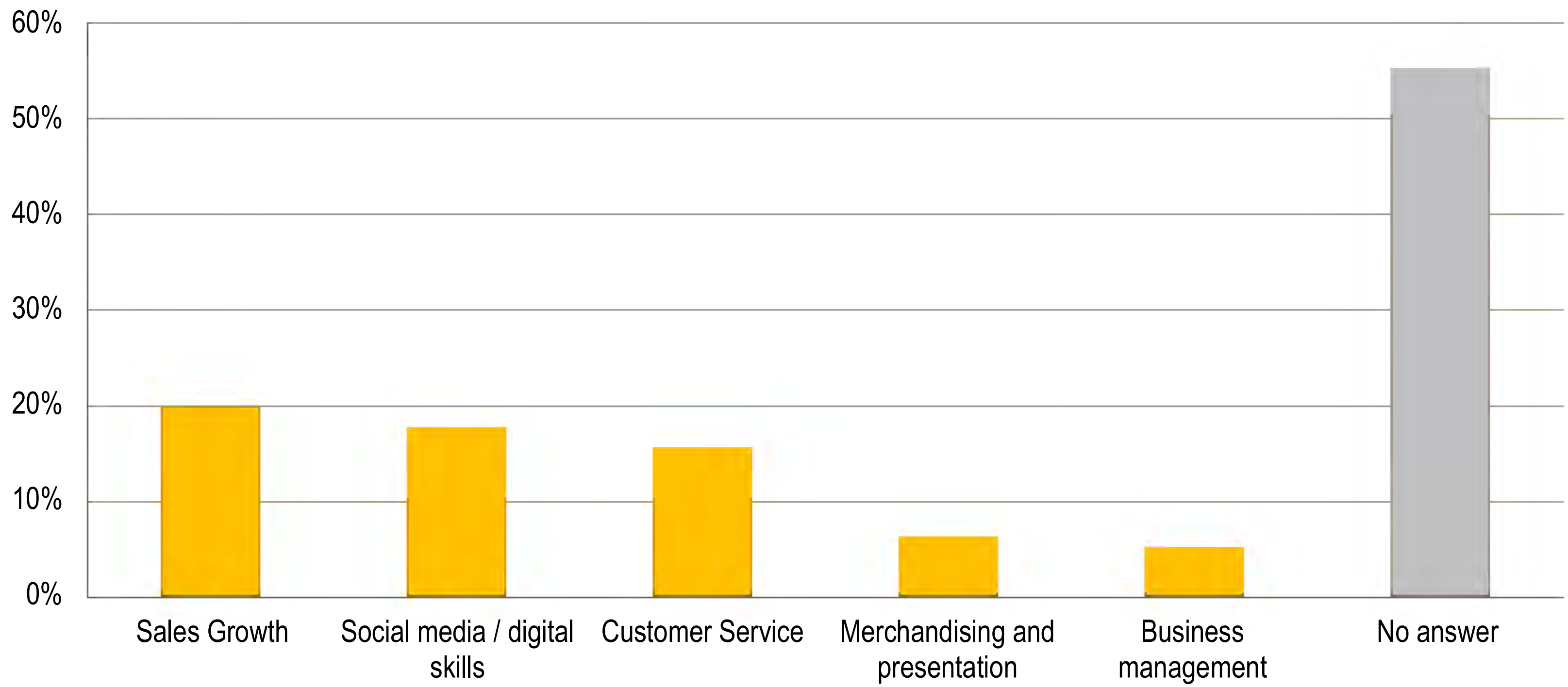


Two thirds of businesses are NOT interested in being part of a town centre management organisation

Of the third that are interested, 75% would like to be passively involved (16 businesses) and 25% actively involved (8 businesses)

3.0 Training Support

3.15 Which of the following topics would you be interested in receiving training support?



In regards the training support wanted by operators just over half do not require external training support

The topics that would be of interest are Sales Growth, Digital Skills and Social Media, Customer Service

3.0 Operator Survey; Miscellaneous Comments

3.16 Miscellaneous

Operators were given an opportunity to provide further open ended comments.

The majority of businesses, 77%, did not provide additional comments.

Those comments made by at lease two respondents included

- More Police / CCTV needed, particularly at night – 6 operators
- Too much crime / drugs / begging – 2 operators

Individual comments are listed in appendix VII.

3.0 Summary of Operator Survey Findings

3.17 Summary

- Great response, 96 completed surveys, good quality information
- Robust data set, variety of business types taking part
- Shirley benefits from a variety of trip drivers, a multi purpose town centre
- High visit frequency, busy at lunch times / early afternoon on weekdays and Saturdays, proven post 6.00 pm trade
- Positive trend for average transaction values
- Lots of identified strengths, although no ‘stand out’ strengths
- Weaknesses are more focussed, parking, choice, variety, safety / security
- Businesses report high satisfaction ratings for own business and also town centre (albeit slightly lower for the town)
- Notwithstanding this there are lots of aspects identified for improvement, parking, choice, variety, market offer, promotion
- Safety / security, facilities and ease of use / environment are all aspects of public realm to improve
- Good year on year performance trends and an optimistic / positive outlook for most businesses
- Half of businesses would like some training support, on sales growth, social media / digital skills and customer service
- A core of businesses would like to be involved in town centre management, with circa 8 businesses choosing to be ‘actively’ involved

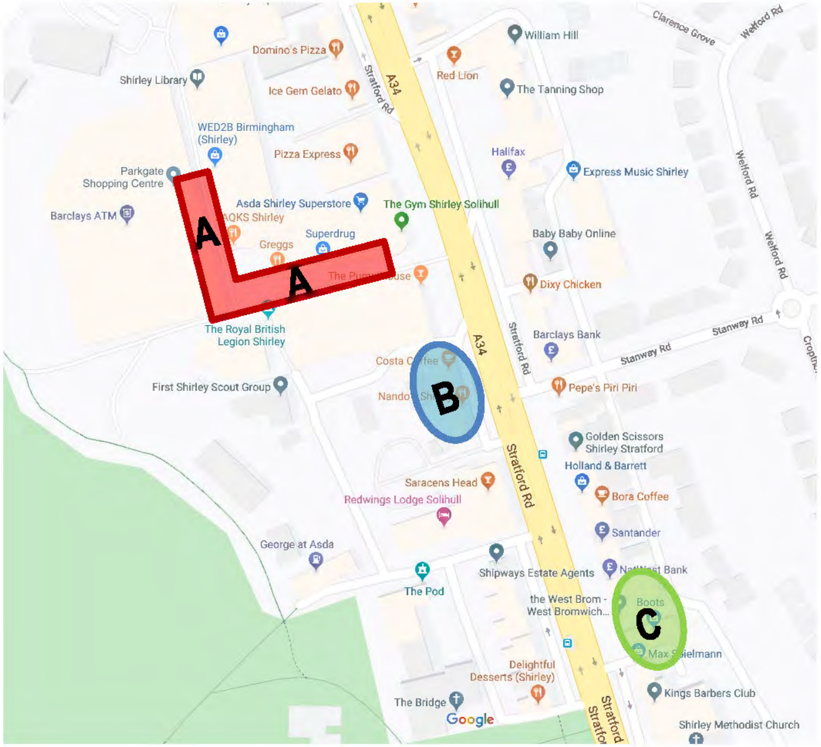
A fairly positive picture, albeit with identified areas for improvement. Shirley is a good place to trade for many businesses.

Survey of Consumers

4.0 Consumer Survey

4.1 Introduction and Methodology

To identify who is currently visiting Shirley Town Centre and how they shop it, The Retail Group commissioned an independent survey of circa 400 visitors to the town centre. The plan opposite shows the three research zones employed.



Surveys were scheduled as per the following table.

	Weekdays		Saturday	Total
	10–17.00	17-19.00		
Zone A – Parkgate Shopping Centre	150	20	50	220
Zone B – Near Costa Coffee	50	20	20	90
Zone C – Near Boots & Nat West Bank	50	20	20	90
Total	250	60	90	400

Appendix VIII contains a copy of the survey.

Respondents were questioned on their main reason for visiting the centre, main mode of transport, frequency of visit, changes to frequency of visit, improvements that would encourage more visits as well as their home postcode.

The actual field research was carried out by an independent research agency approved by the Market Research Society. Furthermore all researchers were MRS badged and approved.

4.2 Sample Profile

In total, 411 consumers were actually stopped and their responses included in the survey.

Of these 64% were female and 36% male.

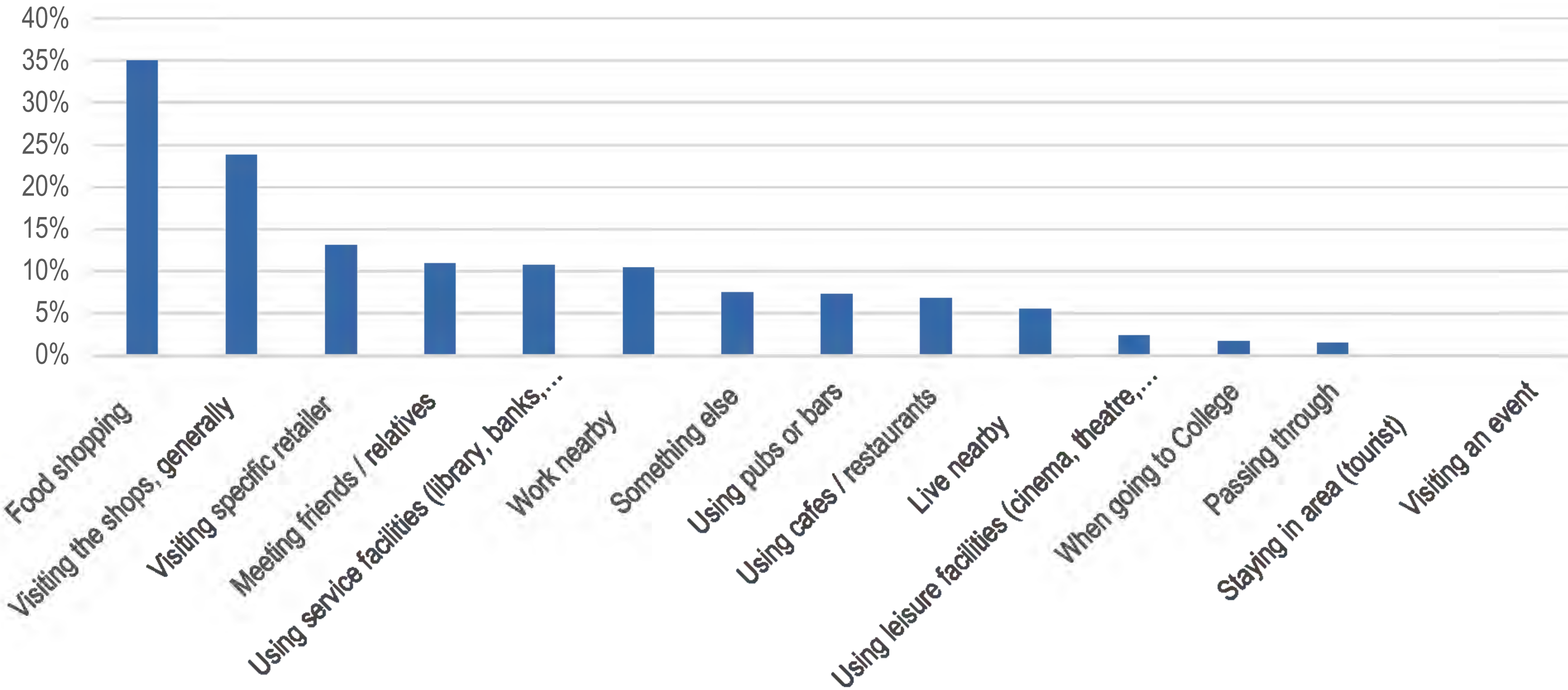
The age split was 18-25 (9%), 26-44 (29%), 45-64 (38%) and 65+ (25%).

78% were surveyed on weekdays, and 22% on weekends.

211 were surveyed in the Parkgate Shopping, 100 near Costa Coffee and 100 near Boots / Nat West Bank.

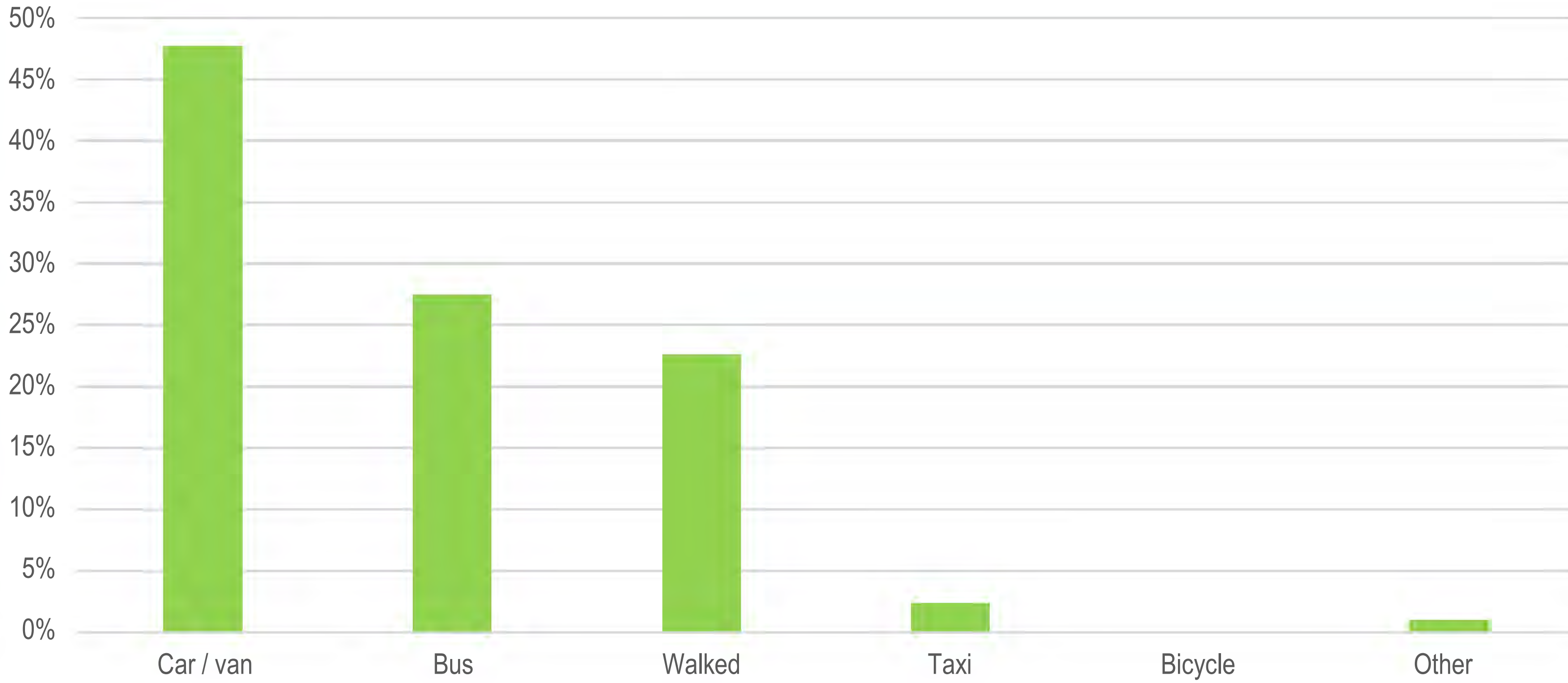
4.0 Consumer Survey

4.3 Main Reason For Visit



Survey respondents are visiting and using the town centre for retail purposes, especially to buy food. The results in the round would also suggest the town centre is being used as a place to meet, i.e. meeting friends and relatives as well as a high use of the service facilities Circa 10% of respondents work nearby. The town centre is attracting customers for a variety of reasons, whilst falling short of acting as a full multi purpose destination.

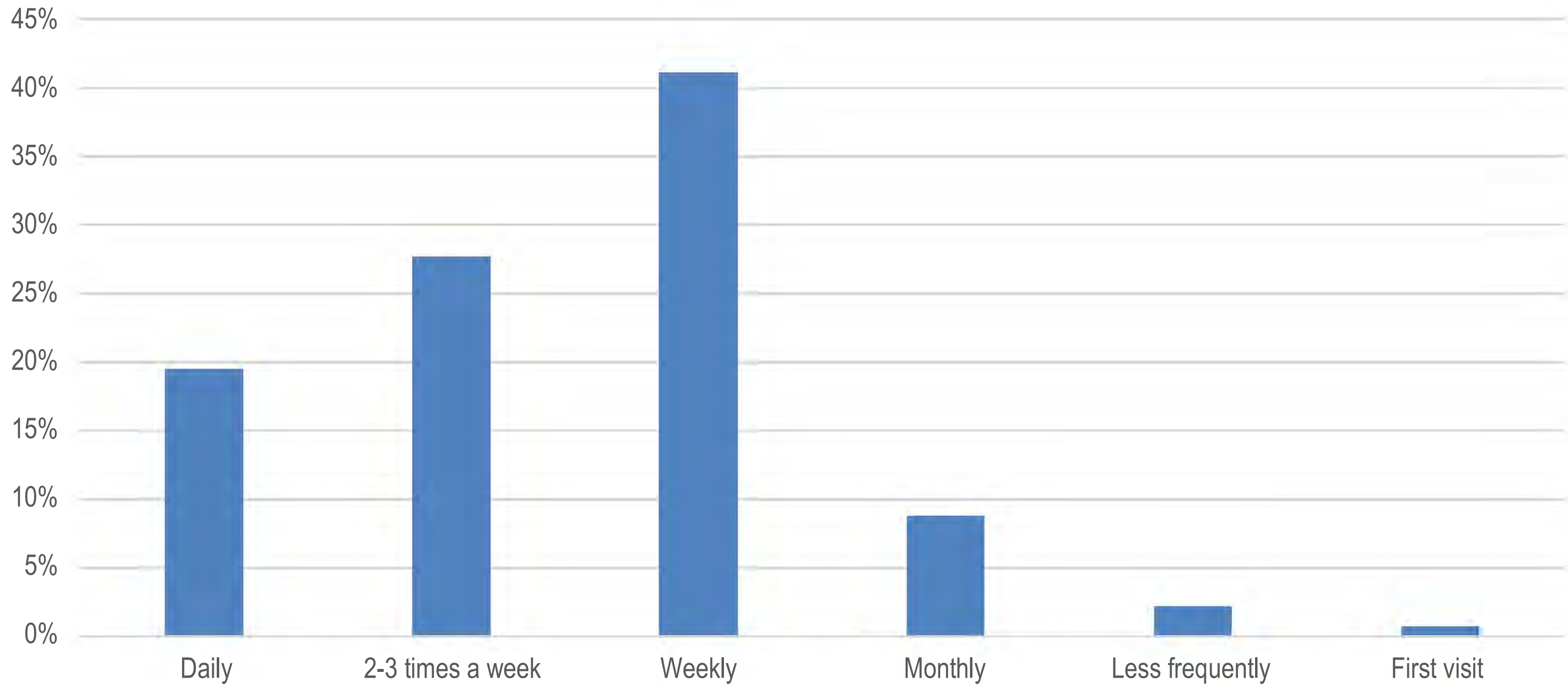
4.4 Main Mode of Transport



Survey respondents are primarily visiting by car, followed by bus and walking. Usage of bicycles is very low, perhaps reflecting the age make up of the sample base or the dominance of the vehicle access.

4.0 Consumer Survey

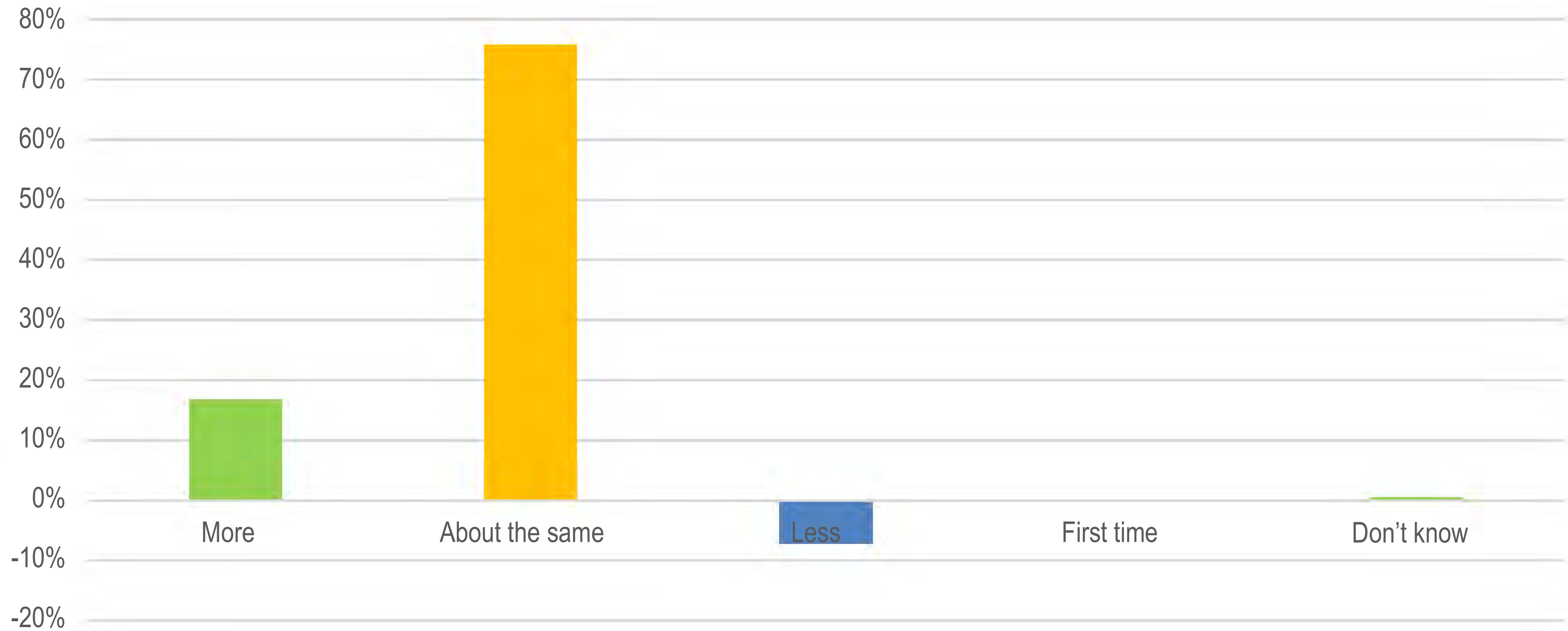
4.5 Frequency of Visit



Survey respondents visit the town centre on a high frequency pattern. 90% of consumers visit at least weekly and nearly half visit multiple times per week!

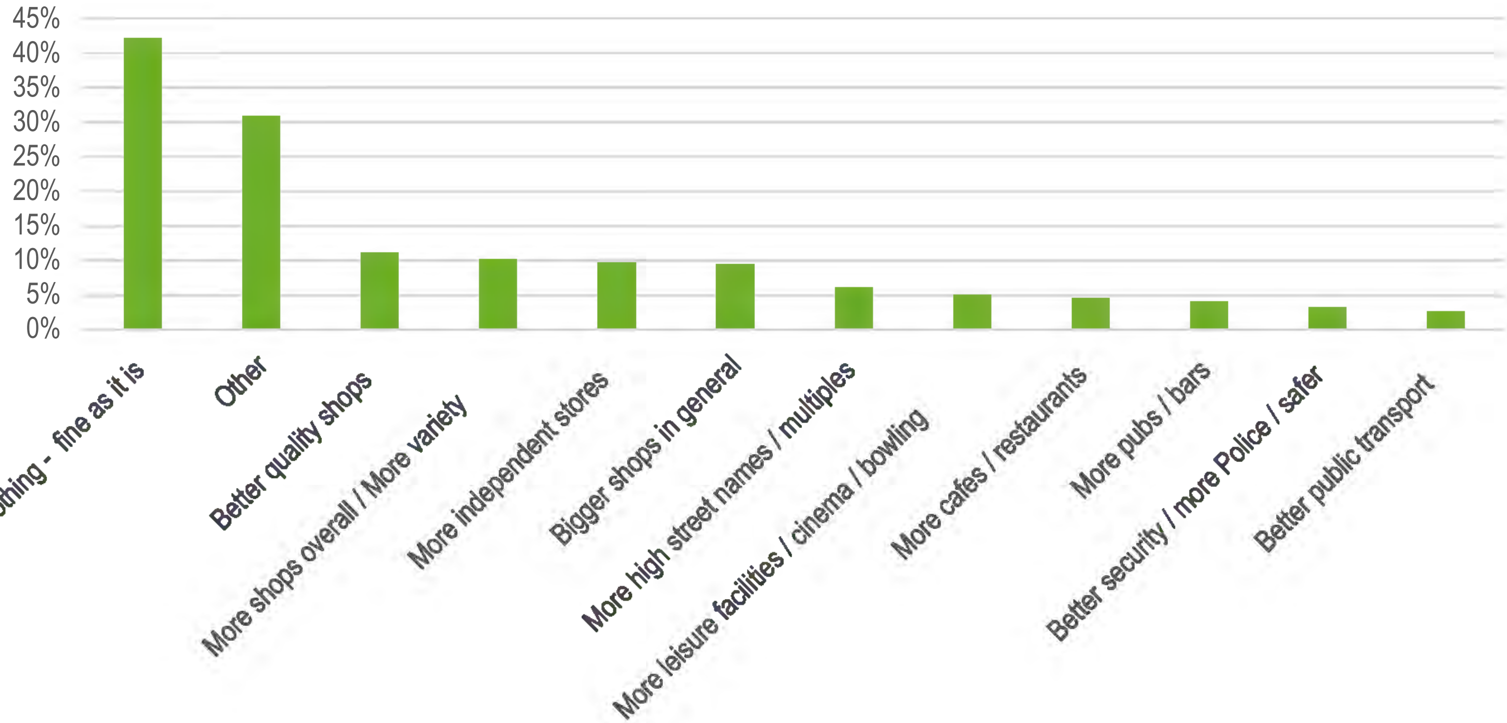
4.0 Consumer Survey

4.6 Changes to Frequency of Visit



This question generates a positive response, with the vast majority visiting at least the same frequency as last year, and nearly a fifth visiting more frequently! Only 7% are visiting less frequently. This is a very positive pattern, compared to many locations we've recently surveyed, and the national picture of declining footfall to town centres.

4.7 What Would Encourage More Visits



Interestingly when asked what would improve it, most people couldn't think of anything to offer or said nothing – Shirley Town Centre is fine as it is. Of those that said other (127 responses), 27 of these said more clothes shops, 16 said less charity shops, 6 said Primark and Wilkinson (each) and all the rest were one or two responses (listed in Appendix 3). Of the remaining specific responses, most related to a bigger and better version of what's there, i.e. more variety / bigger / better quality shops, including independents. More car parking was not a consumer requirement.

4.8 Summary of Consumer Survey

Shirley is attracting consumers to shop there and for a number of other reasons, services, social and hospitality.

As such consumers primarily want to see its shopping offer and experience improved.

Visit patterns are highly frequent, as a result of the convenience goods and service offer.

Three quarters are visiting at the same frequency as last year, and a further 17% are visiting more than last year. This is more than double those visiting less often.

Most people drive, plus a substantial minority get the bus or walk.

Consumers want a bigger and better version of what's there and in particular better quality shops, with more choice, variety and more independents.

Shopper Postcodes & Catchment Area Analysis

5.0 Shopper Postcodes and Catchment Area Analysis

5.1 Introduction and Methodology

The aim of this section is to define an actual shopping catchment for Shirley Town Centre and provide an analysis of the profile of residents in that catchment.

The postcodes of respondents have also been aggregated from individual postcodes up to postal sectors (e.g. from B90 3NP to B90 3) and ranked by % origin, to define a core and secondary catchment for the town centre. This identifies where the majority of people who are visiting Shirley live.

A further inflow area showing where additional residents come from has also been defined.

The profile of both the core and secondary catchments has ten been analysed using Acorn, a lifestyle classification system that segments households into 6 categories, 18 groups and 62 types according to their postcode (12-15 households).

The premise is that people who live adjacent to each other in micro communities, often share similar attributes in regards their age, attitudes, spending power, affluence, level of education, family / life stage etc.

Finally the Acorn profile of all respondents who live in the two catchments has been compared to the GB national average.

5.2 Customer Origin

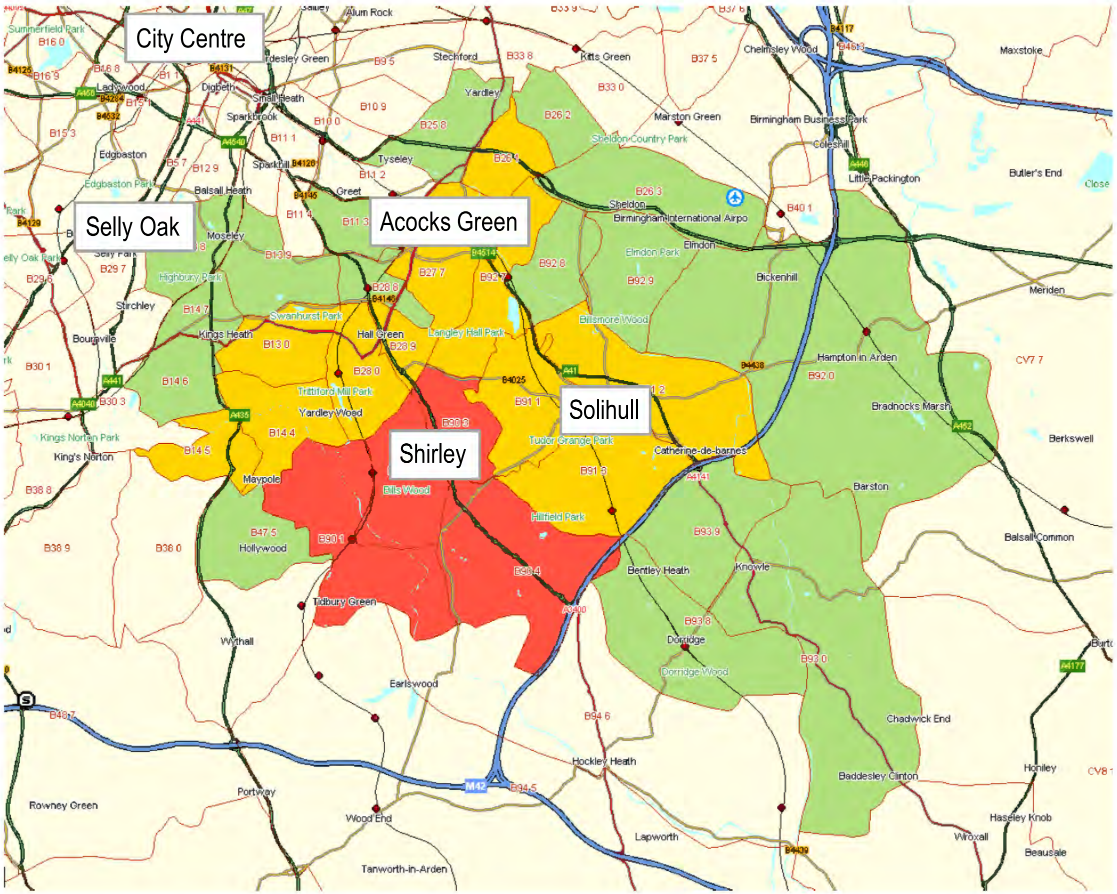
The 411 individual postcodes have been aggregated to postal sectors, and the following table shows where the majority of Shirley's consumers originate in terms of their home postcodes. This is mapped overleaf.

Postal Sector	Number of respondents	%	Cumulative total
B90 3	74	18%	18%
B90 2	47	11%	29%
B90 1	29	7%	36%
B90 4	29	7%	**44%**
B28 0	17	4%	48%
B91 1	15	4%	51%
B14 4	14	3%	55%
B91 3	12	3%	58%
B27 7	11	3%	60%
B92 7	11	3%	63%
B28 9	10	2%	65%
B14 5	9	2%	68%
B26 1	8	2%	70%
B91 2	8	2%	72%
B13 0	7	2%	**73%**

As can be seen, the four postal sectors surrounding Shirley Town Centre account for nearly half its shoppers. This is the core catchment area and is shown in red. In addition, just over a further quarter of consumers (29%) live in an additional 11 postal sectors, which is the secondary catchment area, as shown in orange. Finally a further 16% of consumers can be classed as inflow consumers, travelling in from the green area shown.

5.0 Shopper Postcodes and Catchment Area Analysis

5.3 Shirley Actual Catchment Area



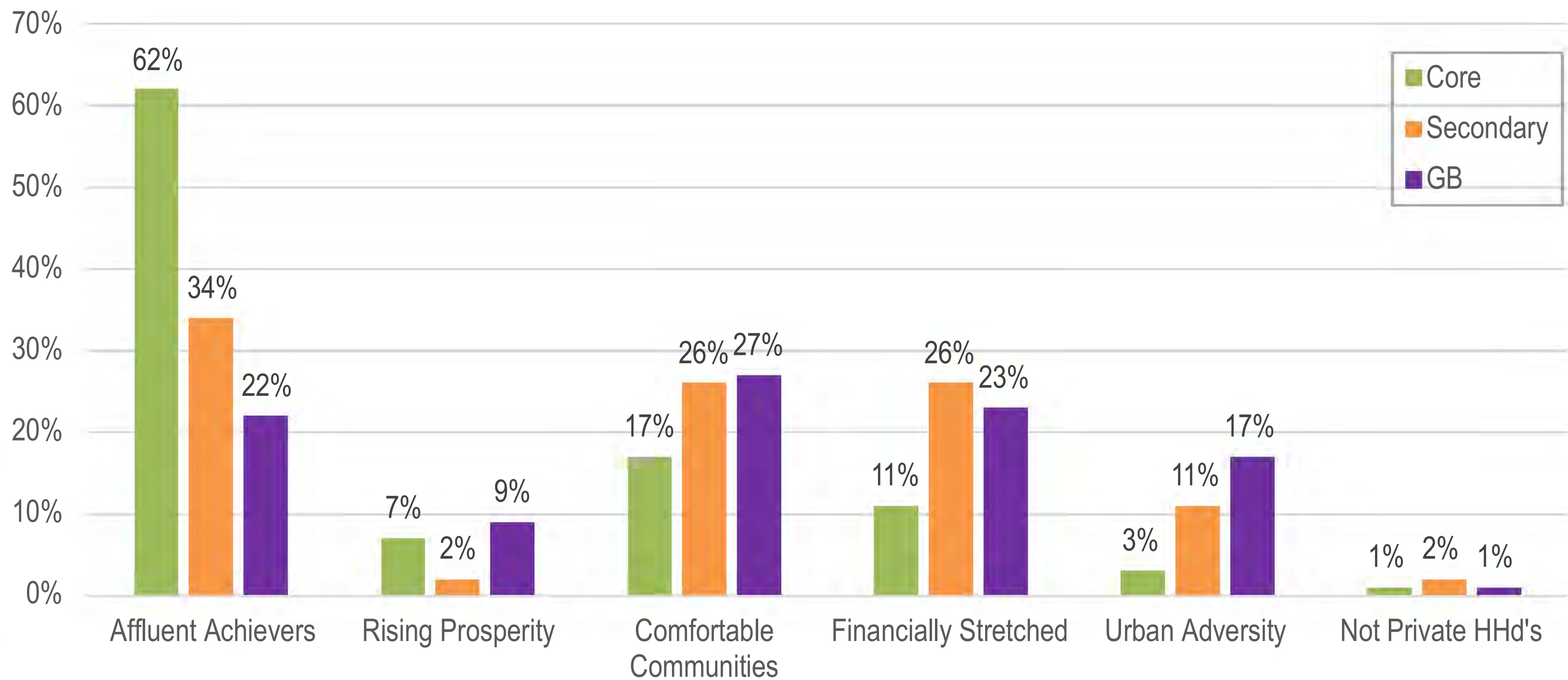
The core catchment area shown in red attracts 44% of visits to Shirley and includes Shirley, Blossomfield, Hasluck's Green, Tidbury Green and Shirley Heath. Over 47,000 residents live in this catchment.

The secondary catchment contains Yardley Wood, Hall Green, Langley Hall Park, Acocks Green, Catherine-de-Barnes and Solihull. This reflects 29% of visitors to Shirley Town Centre. 135,000 people live in this secondary catchment area.

The inflow area (shown in green) accounts for a further accounts for a further 16% of shoppers, and an additional 163,000 residents.

5.0 Shopper Postcodes and Catchment Area Analysis

5.4 Comparison of Core and Secondary Catchment Area Profiles

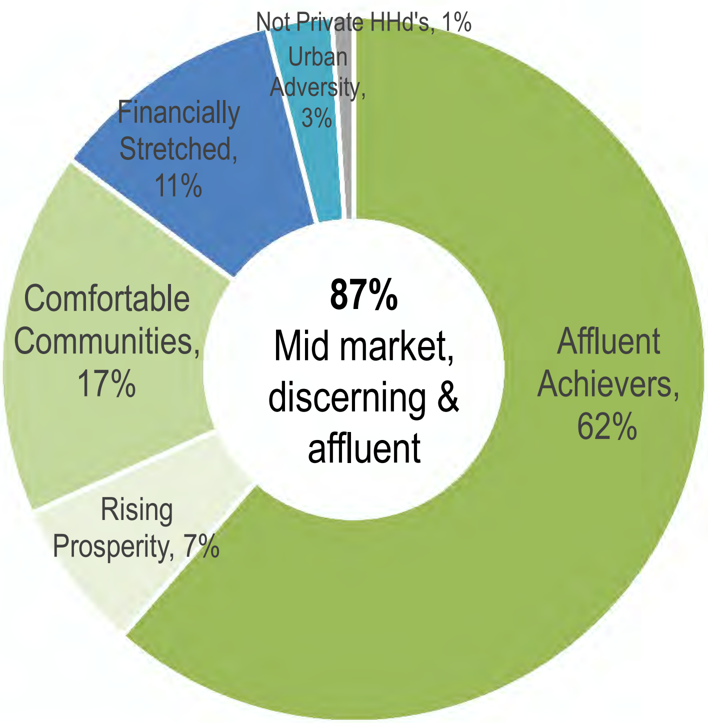


The core catchment area of Shirley is especially affluent, with levels of Affluent Achievers nearly 3 times the national average (the profile of these consumers is described in more detail overleaf). The secondary catchment area is also affluent, with two thirds of residents who could be described as mid market, discerning and affluent.

5.0 Shopper Postcodes and Catchment Area Analysis

5.5 Consumer Lifestyles Profile

The following graphic illustrates that 87% of consumers who live in the core catchment of Shirley (immediate 4 postal sectors) can be described as **mid market, discerning and affluent.**



Affluent Achievers – 62%

Financially successful, well educated professionals, described as "healthy, wealthy and confident consumers".

These are typically wealthy families and empty nesters, high income households living in large houses in the suburbs, edge of towns or semi-rural locations.

A combination of "high income people, successfully combining jobs and families" and "older affluent people with the money and time to enjoy life".

Over index in the +50 years age groups.

Comfortable Communities – 17%

Comfortably off, family oriented households.

Described as areas of low population density, stable areas. Employment is often agricultural but also skilled and professional occupations. Age profile is older than average with leisure interests reflecting the rural location.

Described as "most people are comfortably off, not necessarily wealthy but few major financial worries".

Over index in the +50 years age groups.

5.0 Shopper Postcodes and Catchment Area Analysis

62% Affluent Achievers

John Lewis

M&S
EST. 1884

next

NEW LOOK

PRIMARK

Discerning tastes, big spenders on leisure, high customer service expectations, brands are shown to demonstrate shopping preferences, rather than requirements for Shirley Town Centre

Source - CACI

5.0 Shopper Postcodes and Catchment Area Analysis

17% Comfortable Communities

Gardening
Photography
Older than average
Comfortably off
Lower technology usage
Traditional
Established high street stores
Walking
Food
All age groups

John Lewis

M&S
EST. 1884

DEBENHAMS

co op

LAKELAND

Comfortably off (not wealthy), mix of life-stages, seek out traditional brands. The listed brands are shown to demonstrate shopping preferences, rather than requirements for Shirley Town Centre

Source - CACI

5.0 Shopper Postcodes and Catchment Area Analysis

5.6 Summary of Shirley's Catchment Area

Shirley has a clear core catchment, which consists of the 4 postal sectors that surround it. Nearly half of visitors to the town centre originate from this area. The 47,000 residents that live in this area typically are particularly affluent and discerning, at levels considerably higher than the national average. With 87% of these residents being classified in the more affluent / comfortable lifestyle groups

Shirley also benefits from a clear secondary catchment, containing circa 135,000 residents living in nearby adjoining suburbs and centres. These residents are also typically affluent, but the area also contains about a third of consumers facing financial hardship. Approximately a quarter of Shirley's visitors come from this area. The secondary area is still dominated by the more mid market customers, with 62% falling into these groups, which is a little above the national average, but broadly in line.

Shirley also attracts additional inflow consumers (probably on an infrequent basis) from further afield.

5.7 Housing Growth

Shirley has benefitted from significant housing (residential provision) growth over the last five years and is set to continue to do so, based on the current planning pipeline of developments and the aspirations set out in the Local Plan.

Approximately 520 new dwellings have been developed in the last five years, the majority of which are of general housing stock, the minority has been 'care' type accommodation. Based on HMON information there remains over 1,100 dwellings to be completed (half have outline permission). These are broadly two thirds general residential and one third 'care' type accommodation.

Furthermore the Local Plan identifies sites for a further circa 1,300 additional households. The majority of these are situated within the core catchment area for Shirley Town Centre and will provide a significant number of new local consumers for the town centre.

Stakeholder Discussion / Survey Findings

6.0 Stakeholder Engagement

6.1 Introduction to Shirley Stakeholder Engagement

As part of the research workstreams we have met with a number of stakeholders, either through attending existing meetings, convening dedicated meetings or via individual contact. In each case we have provided the stakeholders with a questionnaire to complete. The style of questionnaire was to ask broad questions regarding the current Shirley Town Centre offer / experience as well as open ended questions regarding its future potential and growth / improvement opportunities.

This approach has enabled the stakeholders to provide their own individual views and opinions. Over 30 different stakeholders have been contacted, surveyed, met with and / or presented to. Many represent, local businesses, community groups, communities, departments at the local authority (SMBC), landlords, developers, institutions and national businesses / associations. A full list of all contacted stakeholders is contained in Appendix X.

We would like to thank those that have taken the time to complete the survey, attend meetings or contact us by phone and email.

Stakeholders that have provided direct input include;

Councillors Karen Grinsell, Maggie Allen, Tim Hodson, Max Mcloughlin, Mark Parker and Rosemary Sexton.

Edward Pitt, Caroline Naven, Louise Morley and Andy Powers at SMBC.

Lee Osborne (FSB), Phil Whiting (Moorgarth), Chris Eggleton (Royal British Legion) and Robert Elliot (Tourism Forum), Mat Hidson (National Express), Chamber of Commerce to name but a few.

It is clear that many stakeholders are both engaged in the town centre and are keen for its continued and improved prosperity. The findings of the stakeholder discussions are presented as a collective summary of views.

6.0 Stakeholder Engagement

6.2 Strengths and weaknesses of the town centre offer (including retail, food & beverage / services / leisure etc)?

Shirley Town Centre's **strengths** include:

- The food and beverage offer
- Shirley Park and direct access to it from the retail area
- These two aspects dominated responses, with multiple references
- A number of other aspects were also frequently listed, albeit at less than half the top two above, these included, location and access, variety of offer, 3 hour free parking, transport and bus access, local community and resident base
- There are also a number of strengths that were listed by one or two stakeholders. These include the independent businesses, sense of community, service offer, food stores, local volunteer groups (litter picks), workforce, charity shops, Parkgate and being on established commuter route / A34
- Over 14 different strengths identified

In regards to the identified **weaknesses**, these included

- Traffic congestion
- Too many charity shops (to be clear this was often stated as 'other people saying there are too many…'
- These two were the most listed
- Beyond these, a cluster of aspects listed by three stakeholders included limited variety, lack of identity, lack of marketing, limited communications, limited offer for young people, traffic and air quality
- Beyond this a number of factors were listed by one or two stakeholders including appearance, ASB issues, linear street, limited leisure, cycle walking provision, insufficient parking, events, split sides to street, too few bigger brands & vacancies
- Over 20 different weaknesses listed

6.0 Stakeholder Engagement

6.3 Opportunities and threats going forward

Opportunities for Shirley Town Centre include:

- Over 21 different opportunities identified
- Most were only identified once, a few had multiple (by two or three stakeholders) listings and these included 'greening' of the high street, more food and beverage offer, growing catchment, more independents, target the experience economy and restore / refurbish historic buildings
- The remaining opportunities were mentioned once. These include vacant shops, create defined centre, stronger identity, develop Lion Square, space to make change, transport and access, cycle and walking routes, strong investment potential, enhance shop fronts, historic buildings, community events, use Shirley Park more for family events, attract more visits and the workforce

In regard to **Threats**, the stakeholders identified 11 aspects:

- Competing out of town or on-line retail activity and ASB issues dominated replies, but only by three respondents each
- Other aspects identified included loss of retail, empty units, lack of identity, lack of a clear strategy, road network and maintenance, local authority budgets, parking, traffic volumes and access

6.0 Stakeholder Engagement

6.4 Gaps in the town centre offer

- The stakeholders identified a wide variety of gaps in the offer. Five aspects were identified by four or more stakeholders:
  - Leisure offer such as bowling, cinema, sports bar, escape rooms, activity
  - Markets – street / covered and regular / visiting
  - Branded retailers
  - Independent retailers
  - More food & beverage operators - day time / destination
- Other gaps included a BID, events, younger retail offer, arts / community space, destination shops, smaller boutique brands, quality offers, better quality convenience shops, dessert shops, more variety / diversity

6.5 Physical and environment improvements that would benefit the town centre

- This question produced the widest range of responses with circa 30 different suggestions. Up to six received multiple mentions, including:
  - Public realm in general, seating, planters, lighting
  - Road junction safety
  - Greening of the high street
  - Linking both sides of the street
- Other aspects identified include toilets, pavements, connectivity, parking and lighting for parking areas, develop Red Lion Square, empty units, heritage and restoration of old buildings, improve entrance to Shirley Park, signage and sign posting, traffic management, road safety and speed calming

6.0 Stakeholder Engagement

6.6 Improvements to the overall consumer experience

- Stakeholders identified a wide variety of aspects to improve. Nearly all were individual requirements. Only a few had multiple mentions and only one out front, which was to improve / increase cycle ways and pedestrian access
- A few aspects had two mentions such as clear identity and branding, more variety, more events and markets, improved public realm, speed controls, on line promotion and WiFi provision
- The remaining aspects were listed by one stakeholder. These included marketing and promotion, improved access, improved bus stops, increase Shirley Park on high street and remove discounter external trading

6.7 Other places and benchmark locations that Shirley Town Centre could learn from / replicate

- Benchmark locations identified include Acocks Green, Kings Heath, Moseley, Digbeth, Leamington Spa, the 'Mini Holland' initiative towns, Manchester's Northern Quarter and the Warwickshire towns network for digital skills training.

We also asked respondents if they could suggest any suitable ambassadors for Shirley town centre, and whether they would they be interested in facilitating the ongoing town centre management.

We have had circa 15 people identified as ambassadors, and a similar number have said they would be interested in an advisory capacity for ongoing management activity.

The action plan will allow for ongoing involvement of those identified and interested in helping to co-ordinate future implementation of the identified initiatives.

6.0 Stakeholder Engagement

6.8 Summary

The collective feedback from stakeholders provides a refreshing and positive range of opportunities to grow and improve the Shirley Town Centre experience and its performance.

A number of aspects are identified as strengths, areas to improve, gaps and weaknesses to be addressed. It is a positive finding in itself that the aspects that received most responses are the improvements areas and not weaknesses.

There are a number of consistent trends in the feedback, and these include,

- The strength of the food and beverage offer, and the need to continue to expand and improve it
- The lack of leisure offers, and the need to add these to the towns offer
- Opportunities to improve the retail offer, not wholesale but with targeted expansion, more independents, a few boutique brands and better quality offers
- Improvements to the public realm, including adoption of wider planned environmental improvements to roads and 'greening'
- A stronger sense of place, identity and centre delineation
- Improved access for cycle, pedestrian and bus customers
- Greening of the high street, including integration of Shirley Park
- Improve connectivity of the two sides of A34, a stronger balance to Parkgate around Red Lion Square
- A markets offer, and improved events offer
- A better offer for younger consumers
- Improved marketing and promotion, signage and branding
- A34 is both an asset and an area for improvement, traffic management and speed controls, adopt future identified interventions from A34 review
- Parking is a strength, but can be stronger

Finally the stakeholders have identified potential ambassadors and that many are interested in supporting the town centre management going forward.

Shirley Retail Review

7.0 Shirley Town Centre Retail Review

7.1 Overview

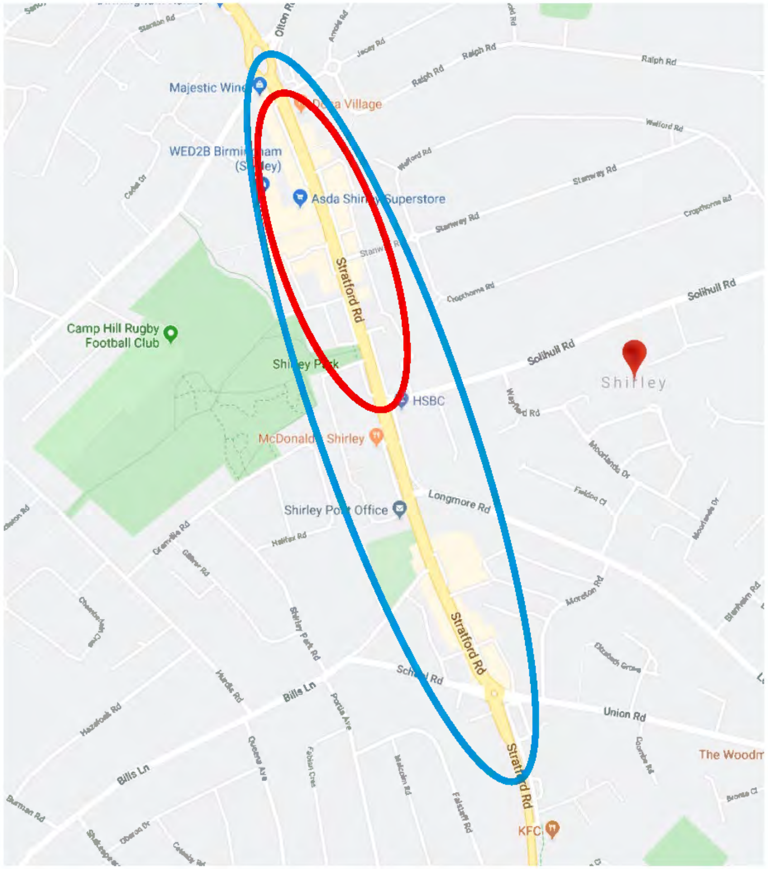
Shirley Town Centre is a long linear retail centre that straddles Stratford Road (A34). Whilst it trades on both sides of the road, there are many places along its offer where there are breaks in the active frontage, on both sides of the road. This does serve to reduce its overall impact.

For the purpose of the retail review, we have mirrored the area covered in the operator survey, that is to say from the 'Poppies' roundabout (junction with Hasluck's Green Road and Olton Road) at the northern end; down to just beyond the junction with School Road / Union Road (blue oval).

This represents an area some 1.3 km (0.8 miles) long.

The core retail area, area with most active frontage on both sides of the road is at the northern end from the Poppies roundabout to the junction with Solihull Road (red oval). This area includes both Parkgate Shopping anchored by a large Asda store and Red Lion Square, as well as the centre's national multiple retailers.

The following pages review the Shirley Town Centre offer in more detail.



7.2 Anchors

Shirley Town Centre benefits from a variety of 'anchors' including the traditional retail anchor stores such as Asda and Aldi, as well as non retail anchors such as Shirley Park, 3 churches and medical facilities.

In considering the various anchor elements we have looked at those parts of the wider offer that drive visits and footfall.

Shirley benefits from a number of different anchors

- Two food stores, including a new Aldi store (although the old Morrisons has recently closed)
- The extensive service offer including many health and beauty / hair salons act as a collective anchor. There is a large stand alone Post Office
- As do the many food and beverage operators, which include many restaurants (chains and independents). There are also a number of large and visible pubs
- The comparison anchors are limited to the destination school wear store at the southern perimeter, and the selection of home, kitchen design specialists
- Non retail anchors also include the parking offer, The Shirley Centre, doctors surgery and medical facilities (despite condition of the buildings) and the Library (slightly hidden)

There are also a number of 'missing' anchors that might be expected to be in place, such as offices, markets, leisure, theatre, heritage, community

7.3 Offer / Mix

The offer in Shirley Town Centre is dominated by the **service provision**, the retail review looked at over 200 businesses and just over 100 of these fell into the service category. Service providers include hair, health and beauty, these account for over 25% of service providers, and cover a wide range of quality and price provision. There continues to be new openings in the hair and beauty provision.

The second dominant element of the offer is the **food and beverage** sector. There are over 50 businesses including restaurants, café's, coffee, pubs and take-aways. Interestingly Shirley has a strong restaurant offer, including both national brands and local independent specialists such as Italian, Turkish and Spanish restaurants. There are also a number of large pubs, both well established with dominant frontages such as The Saracens Head and newer Wetherspoons. The market positioning is from value to low mid market.

The **comparison** goods offer is limited, to a few national multiple brands in Parkgate Shopping Centre, and several home and kitchen specialists, supported by one or two independent specialists.

On the **convenience** front there are the three large operators (food stores and Majestic Wine), supported by an Iceland, butcher and F&V specialist and a number of traditional CTN stores.

The **multiples** offer is fairly limited, Boots, Iceland, Holland and Barrett (new), Superdrug, Poundland, B&M, Peacocks, Ponden Mills, Card Factory and The Works. The multiples tend to be at the value end.

Whilst there are **limited vacant units**, there are some high profile vacant units, former Office Outlet, Bathstore, the former Morrisons and smaller units at perimeter of the town centre.

A key issue for the offer is that it is set back from the passing car traffic, and is also fragmented in its delivery.

7.0 Shirley Town Centre Retail Review

7.4 Place Making / Experience

In reviewing the place making experience of Shirley Town Centre we have looked at several elements that combine to create a place, and assessed their performance, these are reported below:-

Sense of Arrival: Shirley has very limited sense of arrival, indeed it would be easy to drive through and miss it. Its not clear where the town centre starts and finishes. Car borne shoppers will see cars parked either side and miss most of the offer (not Parkgate Shopping Centre due to its signage). Bus passengers arrive and have to negotiate parked cars. Walking shoppers do have wide footpaths but crossing multiple lanes of traffic and parked cars is not easy. As for train passengers, they will need effort to get to the shops.

Facilities: The pavements are wide; however the surfaces look grubby and need repair in places. It does feel as though cars have priority. The car parking availability is plentiful and highly visible, it is clearly popular, evidence of shoppers queuing for their favoured spots. There is some seating and rest points although the environment around them is unappealing. Toilets are not clearly available, except for those within businesses.

Safety and Security: In many ways the centre does feel safe, however the visible graffiti and litter in places, volume of traffic, limited visible security equipment / messaging does make the centre feel less secure:

Information: No clear information provision or where to access information, the boards outside the park and Shirley Centre have limited impact. Lack of signage, promotion summary of offer

Community: The centre lacks focal points, the natural assets are hidden (Shirley Park). The Library is modern but suffers poor visibility. Other community facilities (such as doctor's surgery and medical centre) look tired in comparison to the surrounding buildings.

Many essential and accepted place making components are not being delivered or are weak.

7.0 Shirley Town Centre Retail Review

7.5 Strengths

Shirley Town Centre benefits from a variety of strengths, which underpin a location that appears to be robust and healthy. We have summarised the strengths as follows:-

- Strong and growing service offer (typically these cant be bought on line!)
- A varied and expanding food & beverage offer, with a good selection of family and independent restaurants
- Strong core food anchors, the closure of Morrisons should not be viewed as catastrophic
- The A34 and the volume of passing traffic, along with ease of access for cars, buses and pedestrians
- Parkgate
- Non retail anchors, social, domestic and community reasons to visit the town centre
- Parking
- Recent investment and new openings
- Visible customer base, visible footfall and car borne shoppers

7.6 Weaknesses

Shirley Town Centre has a number of clear weaknesses in terms of its offer, the experience it provides to customers and the limited impact from the offer. We have summarised these below:-

- Fragmented offer, interspersed with non active frontages
- Fragmented offer split by 6 lanes of moving traffic and often two rows of parked cars
- Lack of sense of arrival - 'Welcome to Shirley Town Centre'
- Lack of visibility and impact for the offer, set back from passing traffic
- Small shop fronts
- The environment and pedestrian areas are feeling tatty, poor facilities, and human scale environment
- Visible graffiti and litter
- Much of the street furniture is in poor condition
- Missing components
- Condition and visibility of community anchors / assets
- Under-utilised natural assets and other physical assets
- Lack of information about the offer and reasons to visit
- Limited pro-active appeal to passing traffic
- Lack of branding, information and signage
- Nearby large food stores, and competing centres

Emerging Trends & Benchmark Centres Review

8.0 Emerging Trends and Benchmark Centres Review

8.1 Introduction

A summary of recent trends has been compiled to provide an overview of the current, dominant trends affecting the retail sector and town / city centres. This is based on extensive reviews of published research, reports, articles and insight from industry leaders and our own project experience.

This broad research approach has enabled us to collate the views of a wide audience from industry leading bodies such as the ATCM, BCSC and Institute of Place Management; to research and insight specialists including Deloitte, PwC and Dunnhumby; to retail property and planning specialists, government bodies and other industry specialists.

The retail landscape has and continues to evolve and change – it remains in a state of flux. A clear understanding of what is, has and continues to drive change will help underpin a future successful town / city centre strategy. The ability to adapt and react quickly and readily to these changes is key to future success.

8.2 Consumer Trends

Consumer behaviour continues to change and in the wake of technological advancements it is changing at a rapid pace. Consumers are demanding ever increasing 'convenience' with shopping needing to be an 'easy' experience and "when it suits me". With the advent of the 'connected consumer', consumers want and expect to be able to buy anytime and anywhere.

Home delivery has brought its own issues, in that the recipient needs to be at home to receive the delivery often at a committed time slot, this is contra to the trends in ease and convenience and evidenced also in part by the growth of 'click and collect'.

Meanwhile discounters like Aldi and Lidl have reminded us of the benefits of 'shopping around' and not just for convenience goods, but in a general search for 'value'. Big food stores have also, in some respects, become 'too big to shop' and therefore take up too much time, with smaller local stores becoming quicker and more 'convenient'. This trend has also extended into other categories with retail giants such as IKEA opening small format stores responding to the consumer need for ease and convenience but also for smaller, specialised curated offers.

'Ease of shopping' extends to the full range of facilities in town / city centres, including ease of access, information provision, car parking and adjacencies / connectivity. Customers are increasingly able to choose to go to a location, for many other reasons than the list of retail names present and the size of the stores they trade from. The boundaries between shopping and leisure are becoming ever more blurred, with opportunities to combine leisure, eating and drinking and to 'make a day of it' adding to the appeal of destinations.

Despite the ability of online to satisfy retail requirements quickly, consumers are increasingly looking for meaningful 'experiences' and personalisation; human interaction also remains an important factor.

Consumers, even though overloaded with technology, are still visiting shops. Understanding your customer base; anticipating what customers want and providing it to them is at the heart of any retail, town or city centre proposition.

8.3 Retailer Trends

There is a dichotomy emerging in terms of retailers' requirements going forward. While it seems likely that retailers will pursue smaller and / or more efficient store portfolios there is also a requirement for bigger and better stores in the larger towns / cities and shopping locations.

Successful quality brands do continue to expand, e.g. JLP / Waitrose, Next, Zara and H&M.

There are also new players on the scene as even pure play (on-line only) operators are seeing the benefit and potential to their brand of physical stores. Retailers are increasingly exploring diversity in both store formats and retail channels as well as new product categories and 'mix' of categories. Large format store brands are opening smaller stores and small shop brands are increasing their store sizes. Other different types of operator are also opening stores in town / city centres from farm shops to Dyson to Smeg to Tesla!

What is the new multichannel? - It's best described as an emerging mix of all formats; town / city centre, online, mobile, home delivery, click and collect and out of town. The most successful retailers offer the full set and in some instances different product categories are better suited to different channels.

Retailers' as a group now includes many other types of offer, such as F&B which has seen considerable growth, with F&B now an integral part of any retail offer. F&B and leisure are, and will continue to play, a very important role in the appeal of town / city centres, enhancing the visit experience 'beyond retail'. This leisure role also provides another aspect of the 'multi-functional town / city centre' and thereby an additional reason to visit, while extending dwell time and encouraging social interaction.

Service providers, particularly beauty and personal grooming are also expanding in town and city centres.

One industry leader describes the current state of play as "an age of retail Darwinism" with retailers that actively adapt and change faring the best; 'survival of the fittest'. Some operators will continue to decline, other mostly multichannel operators will continue to expand, while other new players will enter the marketplace.

Retailers are 'upping their game', so too must town and city centres.

8.4 What it means for town centres

While the ageing population is well documented the increase in the proportion of consumers of working age is also a driver of change and is potentially being missed by many. These shoppers have a heightened requirement for convenience, they are time poor, 'ease' is important and they value their leisure time.

Shoppers on the whole like to shop, they like to 'go shopping' but increasingly they like to combine it with leisure and to 'make a day of it'. The focus going forward is less on 'retail', with town and city centres becoming multi-functional with a more diverse offer. The right type of catering, food and beverage, and associated leisure offers is key to healthy town / city centres.

The leisure sector is also expanding and segmenting in the same way that the F&B market has segmented itself into many diverse themes and formats, including coming back into town. Town centre leisure offers are now more than a multiplex and a selection of fast casual / family catering brands. The leisure offer includes active and passive, free and paid for elements. Operators such as gyms, cinema's, boutique cinema's, modern themed crazy golf, simulators, escape rooms, kids play, toddlers play, air parks, table tennis, community meeting space, social, health and well being, reading rooms, bowling, ice and roller-skate facilities are all increasingly taking space in towns and in centres.

Successful centres will be those with multiple purposes and multiple reasons for use and drivers of 'footfall'. 'Click and Collect' potentially has an important role to play in driving footfall into town and city centres. Driving this footfall into both stores and centres has a positive effect on turnover not just for the individual store but surrounding operators and the centre itself.

Centre 'content' will continue to change and evolve, with 'content' much more than just shops and businesses - environment, markets, leisure, facilities, residential and other factors are increasingly contributing to the appeal of the location, making it a desirable place to visit and use on a regular basis.

The high street and local centres are still proven destinations but adapting to changing consumer behaviour and to retailers' needs is paramount to future success; being flexible and adaptable not rigid and stuck in past policies and procedures is essential.

Currently many town / city centres have the wrong type of space. Addressing this with flexible and adaptable policies and interventions will be a key challenge. There is a role for local authorities to 'facilitate', providing the right space and environment for different formats. Wrong type of space includes small units in the core retail areas, as much as poorly occupied tertiary space. Flexible, temporary and meanwhile uses are increasingly being seen as a strength and differentiator for centres.

8.4 What it means for town centres cont'd.

There are lessons too for town / city centres from the big regional malls in terms of the evolving emphasis on high service levels and quality shopping experiences, alongside effective stakeholder collaboration - working 'as a whole' for the benefit of all. The example of major shopping destinations such as; Liverpool ONE, Bullring, Leeds Trinity, etc. shows evidence of and the reward from providing investment in new space and offers, proactive strategies and collaboration with private and public partners in delivering change and attracting 'new' retail names and brands to their locations. These major locations have all added new dimensions to their offer; bigger stores, specialist niche curated offers, varied food and beverage themes and offers, leisure and even cultural elements.

Embracing technological advancements and understanding ways in which consumers want to interact with you is becoming ever more important. Understanding the important role that digital and social media now play in information finding, recommendation and social interaction whether this is via websites, provision of town / city centre Wi-Fi access and / or creating a destination that can be 'liked' raising the profile and awareness of the location, will drive visits and increase appeal.

The shopper is increasingly expecting good quality public realm and art to be an integral part of the experience and reason to choose a shopping location.

This links to the need for centres to have real sense of 'place' that connects with the consumer, providing a point of difference and a connection to the local community. The 'cookie cutter' approach to a shopping centre with the same mix of retail brands and branding has become associated with 'old style' retail and even failing centres.

Consumers like and embrace well run events and markets. These are also opportunities to develop unique destination appeal.

Shopping centres, small medium, large or even regional malls can no longer rely on their own offer to attract footfall and shoppers.
Centres need to engage with and embrace the towns (places) they operate in, forming strong ties with other attractors / destinations in the location - the 'other' reasons to visit that make up multi-purpose locations.

8.5 Summary of Trends

- Consumers want experiences
- Consumers want multiple rewards or reasons for using a centre
- Consumers seek reasons to choose a centre; they are looking for ease, value, quality, shopping as well as eating / drinking and leisure
- Shoppers are increasingly shopping via a variety / combination of multiple channels
- Consumers are choosing different retail locations for different purposes
- Multi-channel is delivering multi-formats
- Shoppers like big stores and small specialists
- Shoppers also respond to well run regular and visiting markets, as well as events
- Retailers like and benefit from multi-purpose centres; they both ‘feed off’ footfall and ‘share’ footfall. Multi purpose centres include social and non commercial elements as part of the mix
- Retailers are increasingly trading in multi-formats
- Retailers will choose out of town, if no suitable in town provision is available
- Retailers are investing in the larger centres and in high impact stores
- Measuring, monitoring and seeking to continually improve ‘ease of use’ will help ensure continued appeal
- Centres need to provide high quality public realm and associated facilities as part of the overall experience
- Centres need to deliver a sense of place and point of difference that is connected to the local customer base and its various components
- The centre needs to engage and embrace the location to help attract and share footfall

8.0 Emerging Trends and Benchmark Centres Review

8.6 Exemplar Centres / Offers and Components

A desk-based review of benchmark locations has been undertaken to understand their success factors and to draw lessons from their format, content and active components. Locations included; town centres, city centre districts, suburban centres and specialist attractions. Also, locations with a mid market or varied resident base, some with additional consumer groups including visitors / tourists, workers and students. There are several trends evident in the benchmark centres that are relevant to Shirley and its future direction and growth potential, these have been summarised.

Stembrook Lane Dover

- Repurposed former independent variety store
- More of an indoor market
- Support local start up businesses
- Maker / sellers
- Upcycling of furniture and fabrics
- Artist and artisan producers
- Subsidised rents and business support

Market Walk Leisure and Retail, Chorley

- Latest small scale development of cinema, bowling alley, indoor golf, and M&S Simply Food
- 6 screen Reel boutique cinema
- Indoor crazy golf
- Lounges restaurant
- Bowling facility

Bromsgrove Health, Beauty & Wellbeing

- A 'cluster' of dedicated high quality health, beauty and wellbeing operators anchor one end of the 'traditional high street area
- Supported by similarly positioned cafes, F&B, independents home and gift operators
- Organic evolution rather than curated and manged
- Council pump primed with shop fit grants

8.0 Emerging Trends and Benchmark Centres Review

8.6 Exemplar Centres / Offers and Components cont'd.

Cathedral Quarter Blackburn

- Council led development of new 'quarter for the town centre
- Anchored by an established, but underutilised asset (125,000 visitors)
- New hotel, 5 F&B units, 6 floor office building
- All occupied and trading!
- Enhanced public realm and events space
- Increased connectivity between transport interchange and core town centre
- Ph 2 extension currently underway

Bligh's Meadow Sevenoaks

- Purpose built, open, street scape, small scale retail shops, services, cafes, leisure, commercial and parking
- Collective critical mass through market positioning, focussed on mid market consumer
- Themed 'retail'
- Small town, competitive environment
- Mid market independents and selective multiples

Former Knight and Lea (JLP) Store Southsea

- Recreation of a new town centre anchor
- Conversion of former department store to a mixed use town centre facility
- Boutique hotel, shared workspace, individual offices, rooftop bar and restaurant, cafes, specialist retail facilities, gym and leisure facilities
- Creating new work spaces for the flexible and home workers attracted to this quality location
- Private development encouraged by the Council

8.0 Emerging Trends and Benchmark Centres Review

8.6 Exemplar Centres / Offers and Components cont'd.

The review of exemplar centres has revealed that adding reasons to visit centres is essential; i.e. clear, visible layers of appeal; leisure, services and F&B, plus facilities. This also includes having a variety of well integrated 'anchors', which could be both traditional retail as well as non-retail, e.g. former department stores, reconfigured and repurposed, multiplex and boutique cinemas, bowling, gyms, 'active' and urban sport, soft play, F&B clusters, varied F&B daypart offers etc. They can also be innovative temporary / meanwhile uses of vacant space / shop units.

Mixed use developments are important, regardless of scale of site or building. It is crucial to include nearby or integrated residential elements. Ditto public and open space; promotions / relaxation / events and well-designed public realm. All can be key reasons to visit a centre.

Where new retail provision is provided, these need to be high impact retail provision with landmark retail statements and large contemporary glass frontages, or high-quality traditional shop fronts for smaller independent operators. They need to stand out, be memorable and punch above their weight.

Towns undergoing regeneration and renaissance tend to have clear identities, building on and enhancing local assets. They also often include improved and high-quality facilities, including improving markets, evolving and improving retail offer, enabling meanwhile uses and nurturing local start up talent.

The importance of wellbeing, health and beauty as key components and attractions should not be under-played. For all age demographics, the Haven Older People Community Hub in Southend is multi floor activity, health and wellbeing centre for the over 50's.

Several of the benchmark locations have a strong ethos in partnerships and working together. This includes managed towns and centres; partners working well together; BIDs, TCM's and SCM's. It also includes embracing local and hinterland communities, with a very clear open and public focus on their needs and experience.

Conclusions

9.0 Conclusions

9.1 The Customer

It is clear from the research undertaken for this project that **Shirley Town Centre attracts an affluent customer base**. There are 47,000 residents living very close by in a core catchment that reflects 44% of all visitors to the town centre. These residents are upper mid market, affluent, discerning and older. They have a family focus. The customer base is set to continue to grow with the continued completion of new residential developments.

The **town centre also benefits from a secondary catchment** covering a wider, but relatively nearby area, housing some 135,000 residents. This includes a further 29% of visitors to the town centre. Residents in this catchment are also mid market profile dominated, at levels above national average.

Shirley also attracts a wider area inflow, as a result of its accessibility.

There are circa **14,500 workers in the three immediate wards** (at 2016 ward profile information).

Shoppers already **visit for a variety of reasons**, although leisure, heritage, arts, community don't feature. Shoppers like the existing offer and want a better version of the existing mix. Visit frequency is high and maintaining a constant if not improving pattern year on year. Car, bus and walking are the three methods to access.

> Shirley Town Centre attracts multiple customer groups; an affluent local resident living close by using it primarily for shopping purposes, as well as other affluent customers travelling from further afield for shopping, work and food related reasons

9.0 Conclusions

9.2 Customer Experience

The Shirley Town Centre experience is a mixed one. Shoppers like what is on offer, and visit frequently, at the same levels or increasing on last year.

There are clear strengths, such as the F&B offer, the range, and quality of services, Parkgate, its parking and anchor stores. The food store offer and several non-retail attractors. The A34 is both an asset and a detractor, but there are aspirations to improve it.

There are several visible issues ranging from anti-social behavior (mainly according to businesses), customer facilities, to aspects of public realm, the lack of identity, no sense of arrival or 'place' and the traffic dominated street scape. The traffic, and the parked cars / parking access roads on both sides of the A34 provide and allow for easy access, however they reduce the impact of the shops and other offers, whilst at the same time emphasising the air pollution. Some of the non-retail more 'community assets need improvement to match the wider experience.

Shirley Town Centre needs to improve the experience for 'people' to above the level provided for cars / vehicles.

Shirley Park is a widely recognised asset and differentiator that can be built upon to provide a greener experience, without attempting 'green-washing'.

There is much to like about the Shirley Town Centre retail experience and consumers are positive about it. The experience is however overly dominated by traffic, has a poor sense of arrival and visible ASB is a significant issue for businesses

9.0 Conclusions

9.3 Current Performance

Performance indicators in the town centre are positive on many levels. Businesses have reported positive sales and customer trends. Customer numbers are good. Average transaction values are good, 55% either up or level on last year.

More businesses are trading up on last year than down and more are up than level.

Businesses are positive about future performance with 4:1 thinking it will improve compared to decrease. Businesses are satisfied with their performance, with a 5:1 positive ratio. There is a 3:1 positive ratio for how the town is trading.

Customers are visiting at a high frequency and at increasing levels.

The above indicator provide a positive base on which to build. Improvements need to be evolutionary not revolutionary!

Shirley Town Centre is performing well and at levels much better than many of the towns we have worked on recently

9.0 Conclusions

9.4 Stakeholder Aspirations

There are several consistent aspirations in the feedback. The food and beverage offer is a strength, which would benefit from a continued focus on improvement and expansion.

Other issues include the **lack of leisure offers** (and the need to add these to the towns offer), **limited markets and events offer**, **poor connectivity of the two sides of A34.**

Improvements wanted include a **stronger balance to Parkgate around Red Lion Square, targeted improvements to the retail offer, more independents, a few boutique brands, better quality offers, more for younger consumers and Improvements to the public realm.**

Further aspirations include a **stronger sense of place, identity and centre delineation, improved access for cycle, pedestrian and bus customers, greening of the high street, better integration of Shirley Park, stronger community assets and improved marketing and promotion, signage and branding**.

It is apparent that the **A34 is both an asset and an area for improvement**, traffic management, speed controls. Similarly parking is a strength but could be stronger.

Stakeholders want to see a range of improvements delivered including a bigger, better and easier to use offer, better integration and cross-use of the various components and better marketing & promotion

9.0 Conclusions

9.5 Strategic Growth Opportunities

Shirley Town Centre has a significant opportunity to build on the appeal the existing assets. And these assets are more than just 'retail'. Multi purpose centres are those that are performing best and have most appeal to inward investors. The nonretail more community facility assets will benefit from investment and improvement, they will also benefit the overall town centre and the community.

Adding layers of appeal is essential going forward . Small additional layers can be successful e.g. markets events, pop up and meanwhile uses are key.

Closed shops would benefit from being repurposed as well as keeping ground floors active. Retail is more than traditional shops, service, activity, leisure, convenience, makers, and hospitality. Experience includes facilities, safe, convenient, services and events, and include community facilities.

Identified growth opportunities will improve employment, facilitate entrepreneurship, help new businesses and start ups, increase workforce and provide inclusive growth opportunities.

Managing and promoting are key components. Above all, focus on the needs of the consumer, and 'needs' go beyond the offer.

Lots of opportunities to build on the existing assets

9.0 Conclusions

9.6 Need for better placemaking

Shirley Town Centre **needs to adopt lessons of successful shopping centres** (but not to look like one), including high impact, clear arrival points, good signage, facilities, information and environment.

Other elements to replicate include ease of use, visiting events, seating areas, branding, promotion, on-line social media and coordinated management, e.g. town team / voluntary group.

Shirley Town Centre would benefit from replicating the delivery standards and consumer experience of quality shopping centres

Recommendations

10.0 Recommendations

10.1 Vision

The recommended future vision for Shirley Town Centre is:

Shirley Town Centre will be the centre of choice for its customer base, for their regular retail, service, leisure and social needs. It will be easy to use, desirable, rewarding, safe and friendly for all customer groups. It will provide a quality customer experience for every visit from the daily to the special occasion.

10.2 Recommended Strategic Themes

The study has identified the following strategic themes for areas of improvement;

1. Creating a clear identity and enhanced sense of place for Shirley Town Centre
2. Improve visibility, access and impact of the existing assets
3. Make it easier to use and shop the whole offer
4. Improve the experience, environment and public realm
5. Build on and nurture existing assets and add layers of attraction
6. Introduce markets, events and meanwhile uses
7. Improved marketing and management

10.0 Recommendations

10.3 Create a clear identity and enhanced sense of place

Shirley Town Centre customers are loyal and frequent visitors, the town needs to reward their loyalty with a strong and relevant identity. The vast majority of visitors passing through Shirley Town Centre will do so without realising they have been there.

Through creating a clear identity with strong permanent and additional themed signage / other identifiers Shirley Town Centre will have a stronger bond with the regular and occasional customers.

Clear branding, location identifiers and additional themed signage will help to increase the appeal of Shirley Town Centre

10.0 Recommendations

10.3 Create a clear identity and enhanced sense of place

Actions	Priority	Timescale	Cost
Work with local stakeholders and a location branding specialist to establish a modern, distinctive and uniform brand identity for the town centre. Could be a commission for local artist / college. Use local personalities.	High	Short	Mid
Develop strong arrival statements for the perimeter of the town centre; 'Welcome to Shirley Town Centre'. Incorporate in A34 improvements.	High	Short	High
Make it clear that consumers have arrived in the town centre; bus stops, car parks, train station, pedestrian routes, easy to absorb information	High	Short	Mid
Include both long term permanent brand signage and short to mid term seasonal and event messages. Brand signage to include digital messaging	High	Short / Ongoing	Mid
Identify opportunities to repeat and reinforce brand identity throughout the town centre, at key customer nodal points, existing attractions and anchors	High	Short	Mid
Use branding to help connect the offer on both sides of the A34, to help define the wider town centre area and to emphasise the core area	High	Short	High
Branding signage to include location identifiers / artwork, if it is poppies these should be oversized, or possibly use more Shirley Park imagery. One aspect that might be repeated (but better) from Acocks Green	High	Short / Ongoing	Mid

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-36 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

10.0 Recommendations

10.4 Improve visibility, access and impact of existing assets

Many of Shirley Town Centre's key retail and non retail attractions, components and assets are hidden. Some non retail assets require investment and improvement.

Customers in the town centre and those passing through will therefore often miss them and not buy from them.

Furthermore they are not reminded of the diversity of offer and reasons to visit, whilst improving the connectivity to the whole offer and key components

It is crucial going forward we help the existing excellent assets to be noticed, visited, used and 'shopped'

10.0 Recommendations

10.4 Improve visibility, access and impact of existing assets

Actions	Priority	Timescale	Cost
Encourage more external dining / tables and chairs, to promote activity and create a stronger sense of place	High	Short	Low
Identify opportunities to create large and high impact signs, painted on sides of visible building returns, use upper levels of buildings / windows to promote ground floor uses / brands. Improve impact to passing consumers and to 'far side' shoppers. Shops and businesses to stand out	High	Short	Low (for identification)
Use category signage to feature 'restaurants in Shirley Town Centre'. 'Beauty in Shirley Town Centre'. 'Shopping in Shirley Town Centre'. Look at how to apply appropriate retail park style totems in the town centre environment, to feature the variety available. Digital signage & information	High	Mid	Mid
Position signage and information so that it is impactful to passing vehicles, at traffic stop areas, at bus stops, car parks, cycle and pedestrian routes	High	Short	Low
Develop stronger signage for proven Shirley assets, Shirley Park, surgery, library; and for any new assets developed / introduced. Replicate Parkgate scale of signage for other assets. Improve quality and fabric of existing community facilities (doctor's surgery and medical centre).	High	Mid	High
Bring the front of Shirley Park nearer the street / road. Create mini 'Pocket Parks' along A34 as customer rest points, trees, shrubs and seating	High	Mid	High

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-36 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

10.0 Recommendations

10.5 Make it easier to use and shop the whole offer

Most shopping purchases are impulse and not pre-planned. If a retailer successfully creates temptation, customers will often buy an item when they're either looking for something else or not even looking. The same process applies to the town offer.

We need to promote and remind customers about the whole offer.

Equally consumers are increasingly visiting town centres for multiple reasons; shopping, leisure, work, social etc.

Lets make sure everyone knows what's where, how good, the choice, width, variety. Every time!

10.0 Recommendations

10.5 Make it easier to use and shop the whole offer

Actions	Priority	Timescale	Cost
Assess opportunities for better signage and information package, at all arrival and nodal points along the customer journey, car parks, bus stops, walking and cycle arrival routes. Publish real time parking availability	High	Short	Low (for assessment)
Encourage all assets and attractions to cross promote all elements of the offer, shared customer and multiple visits per trip. This includes non retail assets that are contact points, library, surgery, medical centre.	High	Short	Low
Evaluate opportunity for additional pedestrian crossings, and add more emphasis to the pedestrian crossing points, wider, with additional branding, directional signage at pavement landing points. Incorporate planned A34 interventions.	High	Mid	High
Add more maps of the offer, colour coded operators to emphasise variety and numbers of businesses per category. Physical maps and digital downloads. These can incorporate promotions and info on future events	High	Short	Low
Provide themed shopping / category lists that can be downloaded, via QR codes. Link to website. Produce info pack for distribution via estate agents.	High	Short	Low
Add major attractors and walking distances to attractors on all Shirley Town Centre maps	High	Mid	Mid

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-36 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

10.6 Improve the experience, environment and public realm

Shirley Town Centre's many customer groups are typically comfortable, affluent and discerning. They are experienced shoppers and want high standards of service.

When they visit Shirley Town Centre they want a clean, rewarding and safe experience, which appeals to their 'feel-good' senses. They want to remember Shirley Town Centre for its many strengths and often elements of unique appeal.

The experience, starts before arrival, lasts the whole visit and even longer in the memory. There are many 'new' Shirley consumers, moving into the new homes.

High quality people friendly environment. Safe and well maintained. Well designed and clutter-free. Somewhere to enjoy. Good facilities, memorable public spaces and statements. Positive memories of Shirley Town Centre

10.0 Recommendations

10.6 Improve the experience, environment and public realm

Actions	Priority	Timescale	Cost
Introduce more trees and greening, 'pocket park' and green screens, permanent and temporary / moveable	High	Mid	High
Introduce improved public seating as part of pocket parks or add trees as part of new seating / public realm improvements. Priority can be altered. Include free to use 'activity', boule, chess etc.	High	Mid	High
Treat pavements with higher priority than roads, improved quality fit, ongoing maintenance, cleaning and litter collection	High	Short	High
Improve cleaning routines, Clean team / hit squad to target same day graffiti removal. Zero tolerance on graffiti whilst still facilitating street art	High	Short	Low
Increased visibility for police / security presence, additional cctv, additional cctv signage. Promote shop watch and pub watch. Provide 'help' points to report ASB issues and or cleaning requirements.	High	Mid	High
Increased pavement activity for cafes and restaurants, blended with shared seating areas. Combine with declutter of old street furniture	High	Short	Low
Review the ASB management plan for the town centre / assess opportunities for short term quick wins	High	Short	Low (for review of plan)

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-36 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

10.7 Build on and nurture existing assets and add layers of attraction

Shirley Town Centre has a number of established assets, both individual assets, collective assets and established community assets, these need to be nurtured, enhanced, built upon and where possible expanded. The provision of a new community hub should explored.

There are also a number of identified gaps in the towns offer and where possible these gaps should be filled with the pro-active attraction of suitable operators for available space and or the development of additional space.

Shirley Town Centre is popular and is performing well, however we need to ensure that we continue to improve and expand the offer and reasons to use the town centre.

Building on the established strengths, adding new layers of appeal and reasons to use will ensure that the Shirley customer looks to the town centre more often and for longer visits

10.0 Recommendations

10.7 Build on and nurture existing assets and add layers of attraction

Actions	Priority	Timescale	Cost
Build on existing independents offer by creating a support package and structure for existing and new emerging businesses	High	Short	Mid
Develop priority target operators list, in conjunction with stakeholders, focussed on enhancing choice and experience, reasons to visit, complement existing offer. Use research to identify priority targets	High	Short	Low
Expand range of leisure uses passive and active e.g. comedy clubs, wellbeing centres, 24 hour gyms, urban leisure, children's focussed activities / more for teenagers	High	Mid	Low
Encourage landlords to accommodate greater flexibility and more short term / meanwhile uses; shops + F&B	High	Short	Low
Expand range of health, beauty, day spa offers	Medium	Long	Low
Develop a Shirley Town Centre Prospectus to promote reasons to trade in Shirley Town Centre, and identified opportunities	High	Short	Mid
Establish a register / guide to available units, to make it easier to choose to open in Shirley Town Centre	High	Short	Low
Work with employers and education providers to provide employment and start up support. Identify inclusive growth opportunities.	High	Mid	Mid

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-36 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

10.0 Recommendations

10.8 Encourage markets, events and meanwhile uses

Shirley Town Centre has a number of existing events organised and facilitated by different stakeholders and held in a variety of places, there are many opportunities to expand the events activity, improving on existing events adding more events, more community activity and so on.

Equally there is the opportunity to host a regular market in the town centre, a quality offer focussed on needs of Shirley consumers; and additional visiting themed markets.

Consumers (especially workers, families and students) love street food. A well curated offer provides different reasons to visit each week. It also appeals to the more affluent consumers that shop at artisan maker markets, farmers markets & food festivals.

The markets and event offer can also be expanded by meanwhile and start up uses, in temporary accommodation or in visiting venues

Markets and events will drive a stronger community bond, providing easy start up opportunities for local people and adding layers of appeal to the town

10.0 Recommendations

10.8 Encourage markets, events and meanwhile uses

Actions	Priority	Timescale	Cost
Create markets prospectus for permanent and visiting markets in Shirley Town Centre. Create Birmingham's Columbia Road Market	High	Short	Mid
Encourage local stakeholders and community groups to create more local celebrations and events	High	Short	Low
Expand events programme to target key customer groups, shoppers, families, workers, and visitors	High	Mid / ongoing	Low
Identify multiple event locations around town centre, and locate events throughout centre to attract consumers to all areas, use wide pavements Markets and events can vary in size and frequency	High	Mid / ongoing	Low
Encourage wider Shirley stakeholders and attractions to develop events for the town centre, build on established events from across the community, encourage community events into the town centre	High	Long	Low
Develop a register of properties for meanwhile, temporary and pop up uses. Promote these to local residents, community groups and education establishments. Secure owner support and additional funding	High	Mid	Low
Work with employers and education providers to provide employment and start up support. Identify inclusive growth opportunities.	High	Mid	Mid

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-36 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

10.0 Recommendations

10.9 Improved marketing and management

Shirley Town Centre has a plan to improve its appeal and attraction to existing and new customers. Clearly there is considerable support and interest from a wide variety of stakeholders to make Shirley even more successful.

A strategy without implementation is not effective, and the effective implementation will need managing. It will be key to identify a workable management group and a leader or leaders for the workstreams. Develop the implementation plan.

There will be a need to identify how to manage the implementation particularly over the short to medium term, if an alternative BID is to be formed. It will be important to achieve shared ownership and collective buy in.

Going forward there are many opportunities to improve the collective marketing and promotion activity, building on proven successes such as Christmas Lights and Shirley Park

A clear implementation plan and management process is essential to achieving the vision and delivering the strategy / economic plan

10.9 Improved marketing and management

Actions	Priority	Timescale	Cost
Develop a cascade presentation to share with all stakeholders, this will be key in securing support and buy in for implementation	High	Short	Low
Explore funding opportunities and support for Town Team and TCM, this will range from voluntary funding, match funding, LEP funding. The action plan will need implementing and managing. Developing a BID will take time. Outline the implementation plan and timetable.	High	Short	Low (exploratory cost)
Identify an implementation leader, either a new TCM role, seconded from the council, a Town Team Leader or an independent appointment. The key is to have a recognised individual to implement the action plan	High	Short	Low
Work with local partners to develop and launch 'We ♥ Shirley' social media campaign, customer oriented website and information portal. (Precursor to any new Love ♥ Shirley BID)	High	Short	Low
Promote established strengths, accepted reasons to use, remind all consumer groups of what they like / use, use maps and category lists	High	Short	Low

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-36 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

10.0 Recommendations

10.9 Improved marketing and management

Actions	Priority	Timescale	Cost
Positive promotion of all new initiatives to enhance customer experience, public realm, improved facilities, pavements, pocket parks, improved arrival points, bus stops etc. New website and social media as core promotion medium and link to any physical opportunities	High	Mid	Mid
Encourage community participation / engagement and support in improvements, welcome / arrival points. Promote community participation. Harness community support into the Town Team	High	Short	Mid
Create local retailer awards initiative, promote strength of independent offer	High	Mid	Low

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-36 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

Appendix I –
Post COVID 19 Recommended Actions

THE RETAIL GROUP

informed solutions

Shirley Town Centre Priority Actions During and Post COVID-19 Lockdown

Overview: The Retail Group have recently completed and delivered the Shirley Town Centre Economic Growth and Action Plan Report. This report has identified a series of actions to be implemented over the next three years to improve the vitality and continued success of Shirley Town Centre.

SMBC has asked The Retail Group to identify the priority actions that can be implemented now and over the immediate few weeks to help the town centre and the businesses that operate in it, to recover effectively from the enforced lockdown period. We have reviewed the report's identified actions and prepared a summary below. In selecting the priority actions, we have used the following aims (as reflected in the Town Centre Recovery Planning Summary already provided).

Aims:

1. **Make the town centre as 'welcoming' as possible,** i.e. easy to use, easy to choose, safe, accessible, **that it is clearly 'OPEN'**, seating, lots of available parking etc.
2. **Help the businesses in it to operate effectively, particularly the many independents,** i.e. collective promotions, recovery planning support, webinars, checklists, 121 sessions etc.
3. **Help all components to operate effectively. Clearly promote all that is 'OPEN', when it is open,** promote all component parts, range and reasons to use, park, community facilities, medical, schools, workers etc.

Priority Actions:

We have added in the action to complete a Town Centre Recovery Plan for Shirley Town Centre as the first action, as we believe it will help to provide input and direction for many of the other priority actions listed. The remaining actions are all taken from the tables in the recommendation section of the report.

Priority Actions	Potential Recovery Plan Action?	Potential TRG Support
Undertake Town Centre Recovery Plan Development (see attached summary). Engage stakeholders, harness community support, build volunteer force		**Yes**
Develop strong arrival statements for the perimeter of the town centre; 'Welcome to Shirley Town Centre'. To include and promote Shirley Town Centre is OPEN for business	**Yes**	
Encourage more external dining / tables and chairs, to promote activity and create a stronger sense of place	**Yes**	
Identify opportunities to create and install large and high impact signs, painted on sides of visible building returns, use upper levels of buildings / windows to promote ground floor uses / brands, even temporary options	**Yes**	
Use category signage to feature 'restaurants in Shirley Town Centre', 'Beauty in Shirley Town Centre', 'Shopping in Shirley Town Centre' etc.	**Yes**	
Develop stronger signage for proven Shirley assets, Shirley Park, surgery, library, etc.		
Improve promotion of existing community facilities	**Yes**	
Bring the front of Shirley Park nearer the street / road. Create mini 'Pocket Parks' along A34 as customer rest points, trees, shrubs and seating, include temporary facilities	**Yes**	

Shirley Town Centre Priority Actions During and Post COVID-19 Lockdown

Priority Actions	Potential Recovery Plan Action?	Potential TRG Support
Encourage all assets and attractions to cross promote all elements of the offer, shared customer and multiple visits per trip. This includes non-retail assets	**Yes**	**Yes**
Provide themed shopping / category lists that can be downloaded, via QR codes. Link to website. Daily updates and postings of 'new' openings	**Yes**	**Yes**
Introduce improved public seating as part of pocket parks or add trees as part of new seating / public realm improvements. Priority can be altered. Include free to use 'activity', boule, chess etc. Include temporary facilities / spaces	**Yes**	
Improve cleaning routines, Clean team / hit squad to target same day graffiti removal. Zero tolerance on graffiti whilst still facilitating street art	**Yes**	
Increased visibility for police / security presence	**Yes**	
Provide 'help' points and helpers	**Yes**	**Yes**
Build on existing independents offer by creating a support package and structure for existing and new emerging businesses, provide 121 recovery planning support	**Yes**	**Yes**
Expand range of leisure uses, passive and active e.g. comedy clubs, wellbeing centres, 24-hour gyms, urban leisure, children's focussed activities / more for teenagers. Include temporary facilities	**Yes**	**Yes**
Create markets prospectus for permanent and visiting markets in Shirley Town Centre. Create Birmingham's 'Columbia Road Market'. Attract visiting markets	**Yes**	**Yes**
Build on established events from across the community, encourage community events into the town centre	**Yes**	
Expand events programme to target key customer groups, shoppers, families, workers, and visitors	**Yes**	
Promote established strengths, accepted reasons to use, remind all consumer groups of what they like / use, use maps and category lists		**Yes**
New website and social media	**Yes**	**Yes**

The table also shows how we anticipate the Town Centre Recovery Planning process and the Recovery Plan will provide input and direction for the various actions.

We have also identified areas where will be able to provide independent support and input. We will be able to assist on the remaining areas as part of the implementation team if required.

We look forward to discussing this with you, if you would like us to be involved in the initial discussions next week, please let me know.

There is clearly a lot of actions that can be commenced and implemented now, that will enable Shirley Town Centre to recover as a strong and vibrant town centre and one that the customers are happy to choose to use. It will be essential to have a clear and collective plan, harnessing local stakeholders, managing the activity and keeping customers fully informed.

Appendix II –
SMBC Town and Local Centres
Recovery Framework

Solihull Towns and Local Centres
Recovery Plan Framework

Solihull
METROPOLITAN
BOROUGH COUNCIL

In response to the COVID-19 pandemic, Solihull Council has developed an Economic Recovery Plan, mitigating the impact and to ensure a sustainable, inclusive and resilient economic recovery. A key priority within the Plan is to support our towns and local centres and high streets, building consumer confidence to return in a safe environment and supporting our businesses to re-open, as well as promoting opportunities to innovate and diversify, supporting the 'Transformation' of our high streets in line with changing consumer demand, the future role of retail and developing mixed use, multi-functional space within our towns.

The Towns and Local Centres Recovery Framework will address actions identified within the Economic Recovery Plan, 'Investment: Projects and Places':

Investment Projects & Places

I3 Support Solihull BID to develop and implement a Solihull Town Centre recovery plan, and bring forward Town Centre development schemes

I4 Implement town and local centre recovery plans including bringing forward Kinghurst Village Centre redevelopment and Chelmsley Wood Town Centre redevelopment

The Framework will be used to support three phases of 'Pre Recovery', 'Recovery' and 'Transformation' to support local centres and high streets across the Borough, identifying 'critical success factors' across five themes that are aligned to those factored within the Greater Birmingham and Solihull Local Enterprise Partnership's 2019 'Towns and Local Centres Framework', the 2020 'Growing our Towns' report and the High Streets Task Force 'COVID-19 Recovery Framework'.

The themes include:

1. Streets & Spaces – Creating a safe and welcoming environment for customers and for businesses to operate, encouraging walking and cycling to support our ambitions to develop our low carbon agenda, where possible.
2. Branding & Communications – Supporting clear and consistent messages to our businesses and consumers, ensuring access to support, supporting relevant social distancing requirements and building consumer confidence to return to our centres.
3. Business Support – Linking our local businesses to developing local, regional and national support programmes, responding to local needs.
4. Partnerships & Structures – Ensuring the right stakeholders are engaged and involved in implementation.
5. Monitoring & Evaluation – Ensuring a co-ordinated plan for each area that is monitored and adjusted as necessary as an ongoing response to changing guidelines and activities.

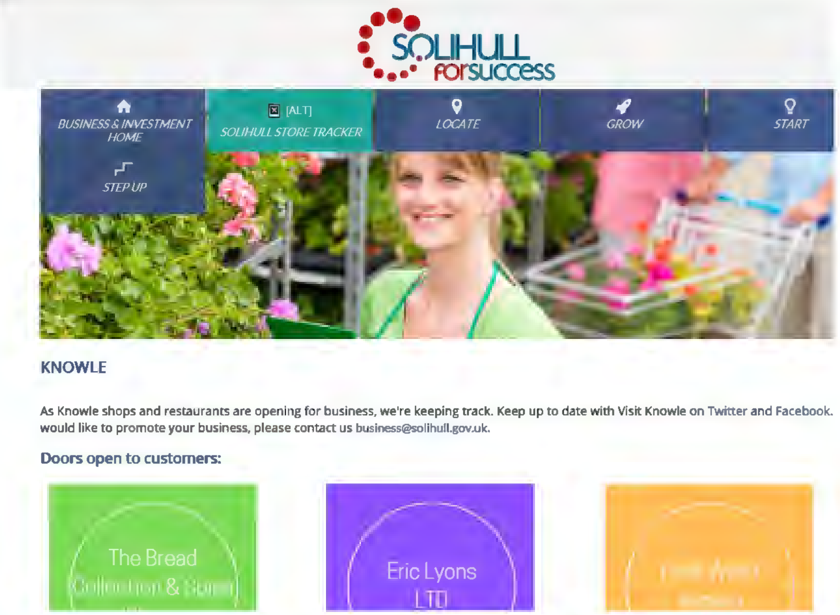
The Framework will be used as a toolkit to support Council officers and individual stakeholders in each centre to identify needs and priorities, building an action plan for each centre. Within each local centre action plan, roles and responsibilities will be identified in order to move at pace and adapt according to Government guidelines and timescales and the Council will seek to add value to the capacity of local stakeholders to deliver their individual plan for their area.

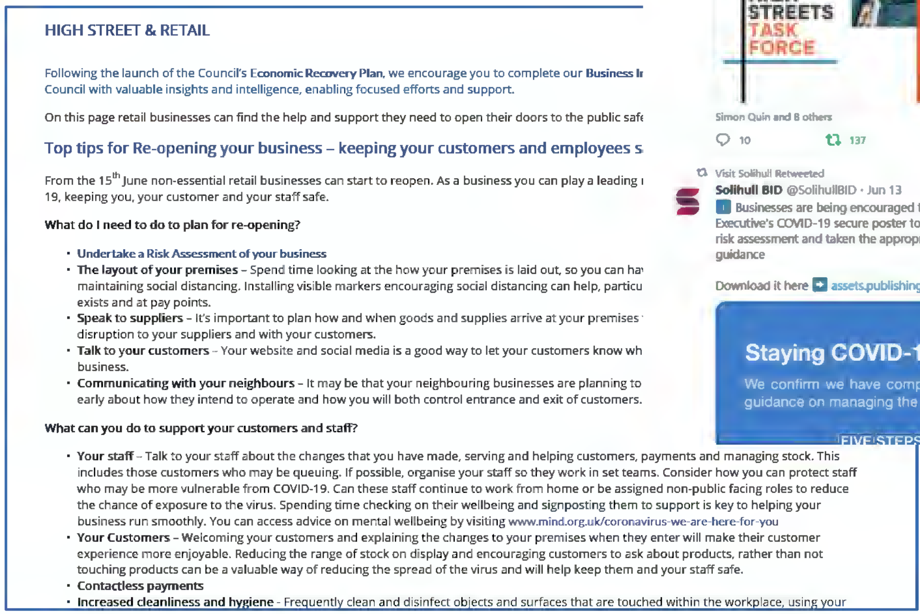
These individual centre action plans will be constantly reviewed in order to monitor progress and fit with developing strategies and programmes being developed at a regional and national level, applying relevant funding where possible, but adapting to local area needs to maximise responsiveness and mitigate local impacts.

Partners identified within each area (but not limited to), include:

- Solihull Town Centre – including Solihull BID (lead), Touchwood, Mell Square
- Shirley – including Shirley Marketing Group
- Chelmsley Wood – including Chelmsley Wood Shopping Centre
- Knowle – including Visit Knowle and Knowle Society
- Balsall Common – including Parish Council
- Other centres including Smith’s Wood, Chester Road, Dorridge, Hockley Heath, Meriden, Olton, Hobs Moat

For all areas, the Council will work closely with regional colleagues at the Local Enterprise Partnership, supporting their Towns and Local Centres (TLC) Framework and opportunities to apply for funding alongside local centre stakeholders to support activities proposed, as well as ensuring local businesses benefit from the emerging programmes developed at a regional level to support high streets.




HIGH STREET & RETAIL

Following the launch of the Council’s Economic Recovery Plan, we encourage you to complete our Business I
Council with valuable insights and intelligence, enabling focused efforts and support.

On this page retail businesses can find the help and support they need to open their doors to the public safe

Top tips for Re-opening your business – keeping your customers and employees s

From the 15th June non-essential retail businesses can start to reopen. As a business you can play a leading
19, keeping you, your customer and your staff safe.

What do I need to do to plan for re-opening?

- Undertake a Risk Assessment of your business
- **The layout of your premises** – Spend time looking at the how your premises is laid out, so you can ha maintaining social distancing. Installing visible markers encouraging social distancing can help, particu exists and at pay points.
- **Speak to suppliers** – It’s important to plan how and when goods and supplies arrive at your premises disruption to your suppliers and with your customers.
- **Talk to your customers** – Your website and social media is a good way to let your customers know wh business.
- **Communicating with your neighbours** – It may be that your neighbouring businesses are planning to early about how they intend to operate and how you will both control entrance and exit of customers.

What can you do to support your customers and staff?

- **Your staff** – Talk to your staff about the changes that you have made, serving and helping customers, payments and managing stock. This includes those customers who may be queuing. If possible, organise your staff so they work in set teams. Consider how you can protect staff who may be more vulnerable from COVID-19. Can these staff continue to work from home or be assigned non-public facing roles to reduce the chance of exposure to the virus. Spending time checking on their wellbeing and signposting them to support is key to helping your business run smoothly. You can access advice on mental wellbeing by visiting www.mind.org.uk/coronavirus-we-are-here-for-you
- **Your Customers** – Welcoming your customers and explaining the changes to your premises when they enter will make their customer experience more enjoyable. Reducing the range of stock on display and encouraging customers to ask about products, rather than not touching products can be a valuable way of reducing the spread of the virus and will help keep them and your staff safe.
- **Contactless payments**
- **Increased cleanliness and hygiene** - Frequently clean and disinfect objects and surfaces that are touched within the workplace, using your

PRE RECOVERY

➢ *building capacity for recovery and transformation*

Key Critical Success Factors	Details	Enablers	Actions & Resources
Streets & Spaces	• Creating a welcoming and safe environment to visit • Ease of connectivity and accessibility • Build in walking and cycling to support carbon reduction where possible	• Additional and visible street cleansing • Access by public transport, walking and cycling • Car parking – re-purposing spaces for social distancing around businesses • Pedestrian safety - pavements, one way systems, ability to 'social distance' safely – outside stores etc • Signage and street graphics to support social distancing • Hand sanitiser stations	• Investigate corporate contracts for signage, hand sanitiser etc • Street cleansing measures • Car parking policies • Adjustments to highways and footpaths
Branding & Communications	• Communication to businesses – guidelines and access to support • Communication to consumers – reassurance, measures to support safety and promote local businesses	• Recognising local businesses who have supported local communities/case studies • Develop campaigns, such as loyalty/voucher schemes to encourage further use of 'shop local' and promote safety/guidance messages • Promote campaigns through 'Shop Appy' • Engagement with business representative groups (Chamber, FSB, BID), fora, business facing teams (Food Safety, Licencing) and individual businesses via mailing lists	• Collation of local 'success stories' • Disseminate guidance from government • Gather local mailing lists/contacts

Business Support	• Recruitment & Training • 121 Support and Action Planning • Business Diversification/Adaptation and Digital Capability • Financial Support	• Planning restrictions/process for business diversification/adaptation • Links to LEP pilot programmes/webinars and local support initiatives • Retail, Hospitality & Leisure and Small Business Grants • Discretionary business grant funding to LAs • Growth Hub Support • Ensure staff have appropriate training on guidelines and PPE where appropriate = signpost to relevant support	• Help develop and promote LEP programmes as and when become live • Promote and help access funding support
Partnerships & Structures	• Community partnerships and buy in • Leadership	• Joined up action plans and masterplans with identified resources/funding • Relevant stakeholder groups and co-ordination through Council • Internal Council 'Task Team' – Licencing, Food Safety, Trading Standards, Public Health, Neighbourhoods, Public Realm, Employment & Skills, Transport	• Set up 'Task Team' and identify leads and responsibilities • Support LEP Town Centres bid for Knowle
Monitoring & Evaluation	• Ensure safety and security of visitors • Ensure business needs are met	• Monitor footfall in centres • Regular surveys and intelligence from businesses • Identify best practice from other areas/countries that have lifted restrictions	• Collate information and best practice sharing • Business surveys and intelligence

RECOVERY

> *after lockdown measures are lifted, getting businesses operational, supporting footfall safely*

Key Critical Success Factors	Details	Enablers	Actions & Resources
Streets & Spaces	• Creating a welcoming and safe environment to visit • Ease of connectivity and accessibility • Consolidating access via walking and cycling to support carbon reduction • Consumer and cultural offer and visitor experience • Utilisation of assets – green spaces/parks, heritage, culture • Developing and investing in latest technology to support consumer experience	• As 'Pre Recovery' • Safety, security and information – lighting, police/warden presence, ability to respond to business or consumer concerns (helplines, help desks, potential for on street presence) • Noticeboards and signage with appropriate information • Integrated approach to access to encourage sustainable travel	• Identify resources for on street presence • New/replace noticeboards with consistent information
Branding & Communications	• Communication to businesses – guidelines and access to support • Communication to consumers – reassurance, measures to support safety and promote local businesses	• Implement campaigns to 'Shop Local' • Recruit local 'Ambassadors' to promote campaigns and special offers via social media and digital platforms • Continue to promote relevant business support	• Recruit Ambassadors through business engagement work • Launch 'Visit Solihull' and support other social media channels/information
Business Support	• Support business survival and cash flow	• Further encourage sign up to LEP pilot	• Identify need for additional

	management as grant payments phase out • Support ability and pace of traditional retail and leisure to adapt to social change and consumer behaviour, embedding new practices in business model	programmes and identify gaps in demand/supply • Identify local needs and resources • Ensure businesses are adhering to appropriate guidelines • Support businesses to embed new working practices and diversification in their business model	resource to support/amplify LEP programmes locally
Partnerships & Structures	• Community partnerships and buy in • Leadership	• Mobilise action plans and adapt as trends emerge	
Monitoring & Evaluation	• Ensure safety and security of visitors • Ensure business needs are met	• Monitor footfall in centres • Regular surveys and intelligence from businesses	

TRANSFORMATION

> *leading improvement and further investment*

Key Critical Success Factors	Details	Enablers	Actions & Resources
Streets & Spaces	• Creating a welcoming and safe environment to visit • Ease of connectivity and accessibility • Consolidating access via walking and cycling to support carbon reduction • Consumer and cultural offer and visitor experience • Utilisation of assets – green spaces/parks, heritage, culture • Successful/right mix of retail, leisure, commercial and residential space to support economic recovery	• Transport Corridor Investment (UK Central) to support sustainable travel and carbon reduction • Public realm investments • Green spaces, ‘pop up’ parks • City Dressing • Commercial property/capital investment to support street market pilots, ‘pop ups’ and innovation	• Invest in public realm and support development of ‘masterplans’ for each area • Future funding bids to LEP Towns & Local Centres Fund to support activities
Branding & Communications	• Unique local cultural image making and branding	• Event co-ordination • Digital platforms – website and social media	• Identify resources and champions to continue activities
Business Support	• Support business growth and innovation	• Support to diversify and grow, according to business trends and needs • Support businesses to embed new working practices and diversification in their business model	

Partnerships & Structures	• Community partnerships and buy in • Leadership	• Town centre ‘management’ resources and long term ownership of action plans	
Monitoring & Evaluation	• Track local centre performance against other areas • Ensure business needs are met	• Monitor consumer trends and ability of businesses and centres to adapt	

Appendix III –
Copy of Operator Survey

THE RETAIL GROUP

informed solutions

Shirley Town Centre - Operator Survey

The Retail Group is an independent retail research consultancy which undertakes healthchecks of town and city centres across the country. We are currently undertaking a retail study in Shirley Town Centre, on behalf of Solihull Metropolitan Borough Council. We have been commissioned to undertake a survey of businesses in Shirley, with the objective of identifying the health of the centre, issues it faces, future needs and ways to support and improve it.

Please share your views and experience with us on a completely confidential basis.

1 Business name Email Contact

2 What type of business do you operate?

☐ Retail shop
☐ Café / restaurant
☐ Pub or bar
☐ Leisure venue
☐ Retail services – e.g. hairdressers, nail bar, key cutting, pharmacy, tattooist
☐ Financial services – e.g. estate agent, bank, employment agency, solicitor / accountant
☐ Business services e.g. printing, IT
☐ Other – please state

3 In your opinion, what is the main reasons for customers to be in Shirley Town Centre?

☐ Shopping
☐ Live nearby
☐ Work nearby
☐ Leisure / cinema / gym
☐ Eating / drinking
☐ Using the retail / financial services
☐ Commuting / passing through
☐ Arts / culture / heritage / tourism
☐ Study nearby
☐ Visiting Shirley Park
☐ Other – please state

4 How often do your customers typically visit Shirley town centre?

☐ Daily
☐ Twice a week
☐ Once a week
☐ Once a fortnight
☐ Once a month
☐ Less often

5 What are your busiest times of day on weekdays, Saturdays and Sundays?

Weekdays

☐ Before 9am
☐ 9am – 11am
☐ 11am – 3pm
☐ 3pm – 6pm
☐ After 6pm

Saturdays

☐ Before 9am
☐ 9am – 11am
☐ 11am – 3pm
☐ 3pm – 6pm
☐ After 6pm

Sundays

☐ Before 11am
☐ 11am – 2pm
☐ 2pm – 5pm
☐ After 5pm
☐ Do not open on Sundays

6 How many customers do you serve roughly per day ________ , or per week ________ ?

7 Over the last year, has your average transaction value increased, stayed the same or declined?

☐ Increased ☐ Stayed the same ☐ Declined

8 How satisfied are you with the performance of your business?

☐ Very satisfied ☐ Satisfied ☐ Neither / nor ☐ Dissatisfied ☐ Very dissatisfied

9 How satisfied are you with the performance of Shirley Town Centre?

☐ Very satisfied ☐ Satisfied ☐ Neither / nor ☐ Dissatisfied ☐ Very dissatisfied

THE RETAIL GROUP

informed solutions

Shirley Town Centre - Operator Survey

10 How would you like to see Shirley Town Centre improve? ***Tick up to three***

- ☐ Better sense of arrival
- ☐ Improved customer flow
- ☐ Better visibility of shops
- ☐ Better waste management
- ☐ A regular market
- ☐ More / bigger shops
- ☐ More variety
- ☐ Additional specialist markets
- ☐ More events
- ☐ More leisure offers
- ☐ More daytime food options
- ☐ More evening restaurants
- ☐ More independent operators
- ☐ New Business Improvement District
- ☐ Public realm improvements
- ☐ More parking
- ☐ Better marketing and promotion
- ☐ More residential
- ☐ More on line and social media
- ☐ Improved public transport
- ☐ More arts / culture
- ☐ Less congestion
- ☐ Other – please state below

11 Thinking specifically about the public realm, how would you like to see it improved? ***Tick up to three***

- ☐ Better lighting
- ☐ Improved signage
- ☐ Improved pavements
- ☐ Better access to shops
- ☐ More customer toilets
- ☐ More public art
- ☐ Improved safety and security
- ☐ Cleaner / tidier
- ☐ More customer seating
- ☐ More trees / green space
- ☐ More focus on heritage
- ☐ Other – please specify below

12 What would you say are the **three** main strengths and weaknesses of Shirley Town Centre?

Strengths	**Weaknesses**
____________________	____________________
____________________	____________________
____________________	____________________

13	Is your turnover up, down or level compared to last year?	☐ Up	☐ Down	☐ Level
14	Are you interested in becoming part of a town centre management organisation for Shirley Town Centre? Actively, passively or not interested? Please provide email contact details in Q1	☐ Actively	☐ Passively	☐ Not interested

15 How positive are you about future trading prospects in Shirley Town Centre?

☐ Very optimistic ☐ Quite optimistic ☐ Neither / nor ☐ Quite pessimistic ☐ Very pessimistic

16 What training / business support would you be interested in receiving? (Please provide email contact details in Q1)

☐ Customer Service satisfied	☐ Sales Growth	☐ Social media / digital skills /	☐ Merchandising and presentation	☐ Business management

17 And finally, are there any other comments about Shirley Town Centre you would like to add or make?

Thank you for your assistance, it is much appreciated.

Please return the completed survey to the researcher who gave it to you.

If this is not possible, please post to The Retail Group, Dunnings Oak Offices, Dunnings Road, East Grinstead, West Sussex, RH19 4AT or email mike.evans@theretailgroup.co.uk

Appendix IV –
List of Respondents In Operator Survey

List of Respondents in Operator Survey

Acorns	Dialema	New Identity	Shirley Royal Brish Legion Club
Age UK	Direct Specs	Northwood UK.com	Shirley Shoe Repairs
Anchor Charity Shop	Dream Doors	Oxfam	Shoe Zone
Angel Nails	Early Years School Wear	Paper + Print	Smart Homes
A-Plan Insurance	Electrue Services	Pasha Turkish Barbers	Solihull Windows
B+M	Eric Bowes + Co	PDSA	Strawberry Fields Bar
Barclays	Fonehouse (EE)	Peacocks	Superdrug
Barnardo's	Hair by Twins	Photo Factory	The Childrens Society
Barrys News	Hays Travel	Pizza Express	The Holiday Warehouse UK
Bella Donna	Holland + Barrett	Pizza Hut	The Plume of Feathers
Boots	Horton + Storey	Prive Cosmetics	The Pump House
Boots Opticians	Jack's Chicken + Chips	Pure	The Red Lion
Burchell Edwards	Jhuots Pharmacy	Reflections	The Tanning Shop
Cancer Research	Kairos Coffee	Restored	The Works
Capricorn	Kings Barbers Club	Salvation Army	Thomas + Youngs Accountants
Card Factory	Lloyds Bank	Santander	Timpsons / Johnsons
Caroline Barton Hair + Beauty	Mail Boxes ETC	Saracens Head	Tom Browns Fruit Shop
Carolyn + Friends Hairdressing	Majestic Wine Warehouse	Scope	Tui
Classic Meats	Marie Curie	Scrivens	Turkish Golden Scissors
Coffee Roaster	May Spielmann / Timpson	Shipways	Vi Stevens Florist
Consol Tanning Studio	Michaels	Shirley Carpey Centre	Wed 2 B
Costa	Nandos	Shirley Kebab House	Whartons
Danes Estate Agents	Nationwide	Shirley Methodist Church	William Hill
Debra Charity Shop	Natwest Bank	Shirley Post Office	Women's Aid

Appendix V –
Strengths According to Operators

Strengths According To Operators

A good mix of daytime and night-time businesses

Apartments being built

Brought in more people

Busy local high street

Friendly public

Front cleaners

Good but declining footfall

Good local customer base

Good to look at

Improvement on bars, supermarkets, restaurants

Layout is great

Location

Major stores

Moving with the times

New

Nice shops

Not too congested

Park Gate

Paved areas

Price

Regular local clientele

Residents

Retail independent shops

Safety

Secure location

Sense of community

Shops are all easy to access

Small town

Solihull village

Stylish

Variety of businesses

Wide open space

Appendix VI – Weaknesses According to Operators

Weaknesses According To Operators

Car park surface / lack of gritting

Chance to use Shirley Retail Park shops

Cleanliness

Closure of a few stores

Customers

Dirty street scene

Doesn't look great at night

Empty office outlet

Gets mistaken as Solihul

Islands way too big

Lack of events (market)

Lack of housing for young people

Lack of interest for young people

Lack of leisure facilities

Lack of traffic control

Lack of upcoming independent retailers

Layout

Lighting

More encouragement for people to visit

More parking needed and longer ticket times

Need better shops

Need to bring more people in

New Aldi parking

No defined ends to the shopping

No independent clothes shops

No toilets

Not affordable housing

Not enough clothing shops + too many charity shops

Not enough events

Not enough for younger generation

Not enough nice bars

Not enough pedestrian crossings

Not free all-day parking

Not very attractive

Pavements are narrow

Retail is declining

Seems to be going downhill

Shouldn't be able to have too many of one thing

Stringent traffic wardens

Too few independents

Too many assisted living apartments

Too many fast food shops

Uneven pavements

Wrong crowd and gangs at night

Appendix VII –
Misc. Comments Made By Operators

Misc. Comments Made By Operators

3 hours free parking is not enough to do Asda and then shop the high street if you have a coffee too

Dying village

General upkeep

High street looks old / tired - would benefit from investment

Lovely park

Make the islands smaller so traffic can get round

Many customers are saying how much the crime rate has massively increased

Not enough for the young

Parking is killing the trade in Shirley

Scrap rates on small shops

Shirley is a great town lacking in diversity

The gaps between retail sections makes for a disjointed Shirley

There are dead spaces

Too many charity shops

Vibrant

Water is a problem after heavy downpour

We need a Primark, decent shoe shops, mens clothing

We need to attract more footfall with a variety of shops

Would benefit from greater police presence to stop graffiti / begging

Appendix VIII –
Consumer Questionnaire Survey

Shirley Town Centre Consumer Survey

Introduction: We are carrying out a survey on behalf of Solihull MBC about shopping patterns in Shirley Town Centre and would like to ask you four very quick questions.

Q1 Firstly, what are your main reasons for being in Shirley Town Centre today? **Multiple unprompted, up to 3**

- ☐ Live nearby
- ☐ Work nearby
- ☐ Visiting the shops, generally
- ☐ Using leisure facilities (cinema, theatre, gym, etc.)
- ☐ Visiting specific retailer
- ☐ Food shopping
- ☐ Staying in area (tourist)
- ☐ Passing through
- ☐ When going to College
- ☐ Using cafes / restaurants
- ☐ Using pubs or bars
- ☐ Using service facilities (library, banks, hairdresser, etc.)
- ☐ Visiting an event
- ☐ Meeting friends / relatives
- ☐ Something else

Write in:

Q2 And what was the main method of transport you used to travel to the town centre today?

- ☐ Car / van
- ☐ Bus
- ☐ Walked
- ☐ Taxi
- ☐ Bicycle
- ☐ Other

Write in

Q3 How often do you visit this centre?

- [ ] Daily
- [ ] 2-3 times a week
- [ ] Weekly
- [ ] Monthly
- [ ] Less frequently
- [ ] First visit

Q4 Are you shopping here more or less than a year ago?

- [ ] More
- [ ] About the same
- [ ] Less
- [ ] First time
- [ ] Don’t know

Q5 What would encourage you to visit Shirley Town Centre more often?
Multiple unprompted, up to 3

- [ ] More shops overall / More variety
- [ ] More high street names / multiples
- [ ] Bigger shops in general
- [ ] More hair and beauty shops
- [ ] More independent stores
- [ ] More cafes / restaurants
- [ ] Better quality shops
- [ ] More pubs / bars
- [ ] Better public transport
- [ ] More leisure facilities / cinema / bowling
- [ ] More / easier car parking
- [ ] Less (dominant) cars / traffic
- [ ] Better security / more Police / safer
- [ ] Less vacancies
- [ ] Nicer environment
- [ ] More events
- [ ] More markets
- [ ] Nothing - fine as it is
- [ ] Other

Write in

Q6 Finally, so that we know where people come from generally, what is your full home postcode?

Q7 Gender

- ☐ Male
- ☐ Female

Q8 Age

- ☐ 18 – 25
- ☐ 26 - 44
- ☐ 45 - 64
- ☐ 65+

Q9 Day

- ☐ Weekday
- ☐ Weekend

Q10 Zone

- ☐ A
- ☐ B
- ☐ C

Thank you for taking the time to help us with our research

Finally I would just like to confirm that my name is ………………………… and this research has been conducted on behalf of the Solihull MBC. All of your comments are confidential and will not be attributed to you personally, nor will you be added to any mailing list. Individual returns will not be made available to any third party and, after analysis, the returns will be destroyed. Would you like to take our telephone number for further reference (01621 814740)?

Interviewer declaration:

I confirm that I have carried out this interview and that I have asked all the relevant questions fully and recorded the answers in accordance with the survey specification and within the MRS Code of Conduct and the GDPR Regulations May 2018.

Interviewer name (CAPS Please) _ _ _ _ _ _ _ _ _ _ _

Signature _ _ _ _ _ _ _ _ _ _ _

Date _ _ _ _ _ _ _ _ _ _ _

informed solutions

The Retail Group

Informed Solutions

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