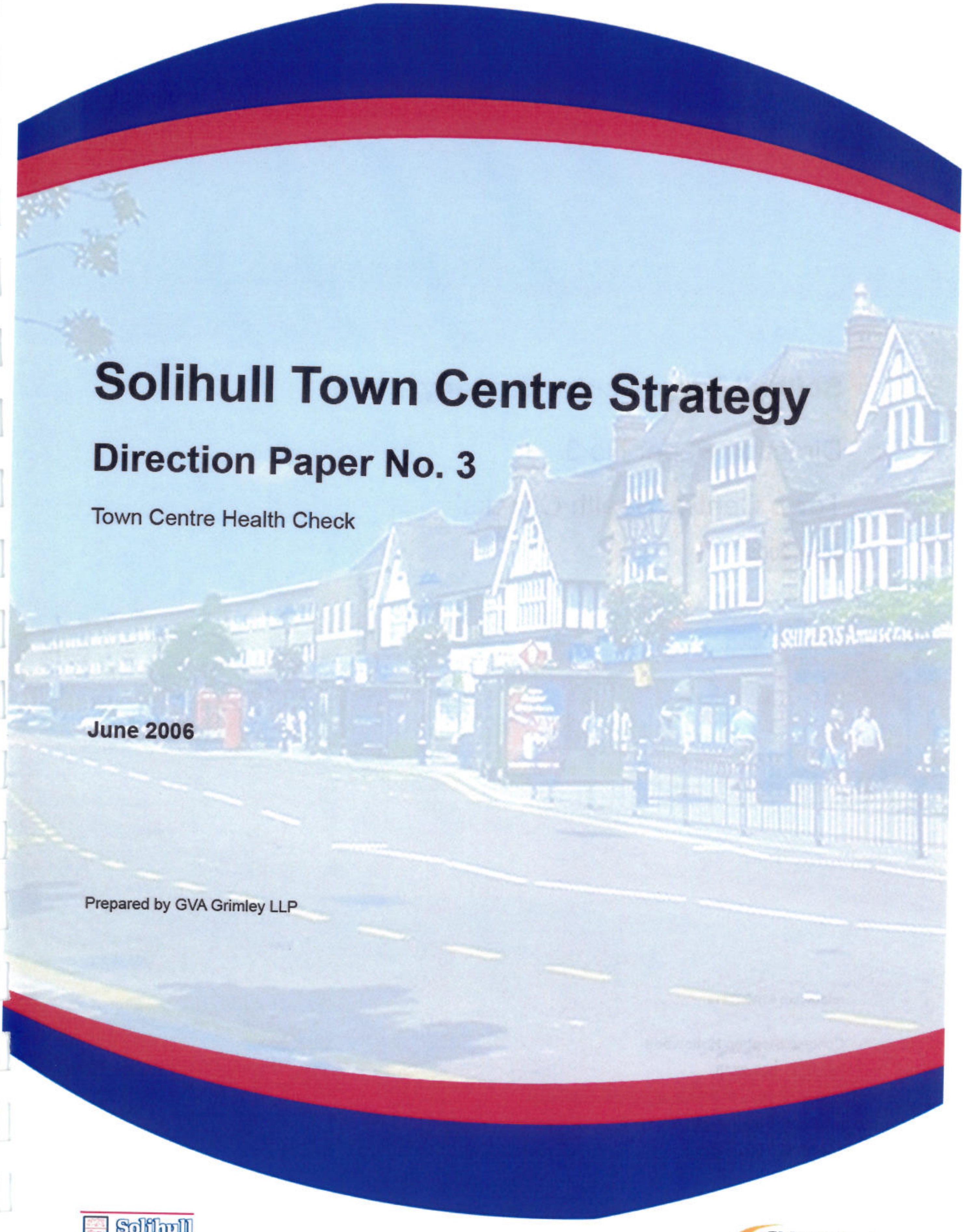

Solihull Town Centre Strategy

Direction Paper No. 3

Town Centre Health Check

June 2006

Prepared by GVA Grimley LLP

Solihull Metropolitan Borough Council

GVA Grimley

Solihull Town Centre Strategy

Direction Paper No.3

Town Centre 'Health Checks'

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Contents

1 Introduction and Purpose

1.1 This Directions Paper provides an assessment of the current state of the main retail centres within the Metropolitan Borough of Solihull. This is achieved by undertaking a 'health check' of the Borough's main town and district centres, in accordance with the guidance set out in PPS6: Planning for Town Centres (2005).

1.2 This Directions Paper is one of six papers that form a robust evidence base for the Solihull Town Centre Study. The other papers are:

- 1. Development and Property;
- 2. Retail Policy Considerations;
- 4. Public Sector Assets;
- 5. Movement and Accessibility; and
- 6. Urban Design Analysis.

1.3 In undertaking this health check, the following key viability and vitality indicators have been considered:

- Diversity of main town centre uses (by number, type and amount of floorspace);
- The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations;
- The potential capacity for growth or change of centres in the network (a view on the potential capacity for growth or change will be one of the outputs of the overall Solihull Town Centre Study and so this report provides initial comments only);
- Retailer representation and intentions to change representation (although the project brief does not allow for the carrying out of bespoke surveys of existing retailers that may wish to change representation, or potential new retailers to the centre);
- Shopping rents;
- Proportion of vacant street level property;
- Commercial yields on non-domestic property;
- Accessibility (again, a view on this indicator is one of the outputs of the overall study and so this report provides an initial comment only);
- Perception of safety and occurrence of crime (although the project brief does not allow for the carrying out of daytime and evening on-street surveys to properly assess this indicator; and
- State of the town centre environmental quality (this issue will be also be considered in further depth as part of the overall study output).

1.4 It has not been possible to form any view on two of the indicators, namely:

- **Pedestrian Flows (footfall):** bespoke surveys at various points around the centre would be required to properly address this issue and the project brief and timescale does not allow for such surveys. Moreover, such surveys are of greatest benefit where time series data is available to monitor change in footfall, particularly in a situation such as that in Solihull where there has been a major shopping/leisure development undertaken with associated high quality car parking that will have influenced materially pedestrian flows around the centre; and

- **Customer and Residents' Views and Behaviour:** another matter where information can only be gained by bespoke surveys for over a period of time.

1.5 Information on the indicators of town centre health listed above have been gathered from a number of sources including Solihull Metropolitan Borough Council, Experian Business Strategies, the Valuation Agency, the Office of the Deputy Prime Minister, Estates Gazette, and Focus. This information has been supplemented by visits to the town centres undertaken by GVA Grimley in March 2006, and discussions with key stakeholders.

Structure

1.6 This paper is structured as follows:

- Section 2 considers the sub-regional retail hierarchy;
- Section 3 reports on the vitality and viability of Solihull town centre;
- Section 4 considers the vitality and viability of Shirley district centre;
- Section 5 addresses the vitality and viability of Chelmsley Wood district centre
- Section 6 reports on the vitality and viability of Knowle district centre;
- Section 7 provides and overview of out-of-centre retail provision in the Borough; and
- Section 8 provides a summary of the conclusions emerging from the health check.

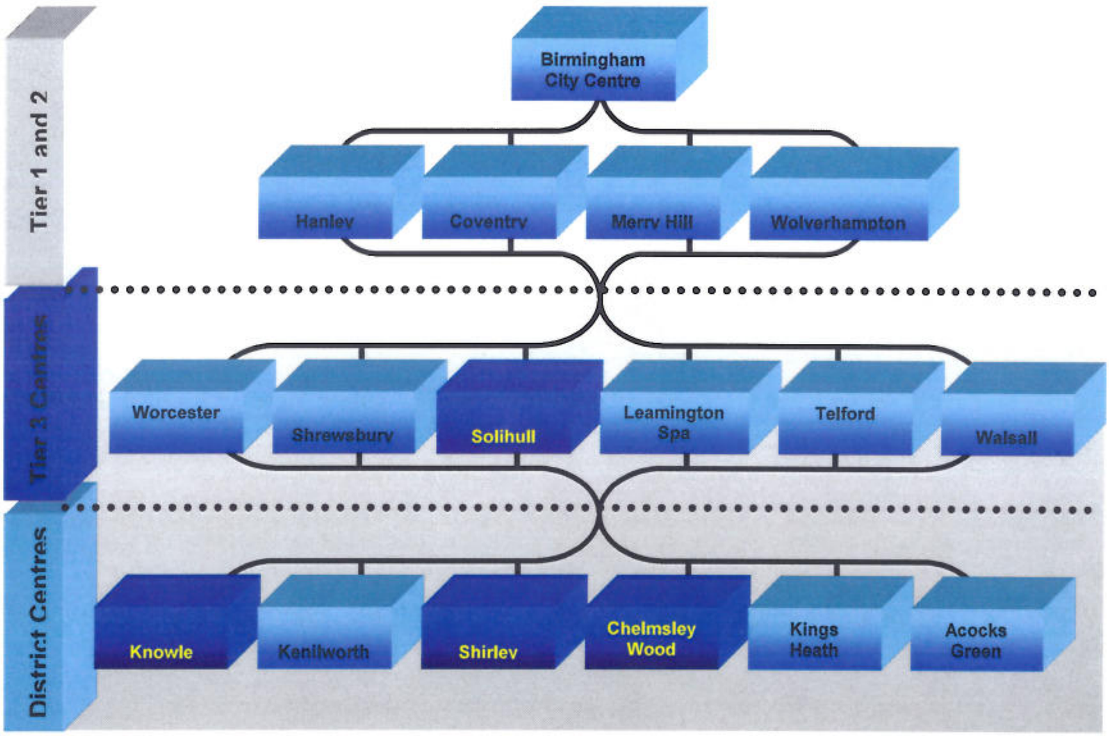
2 The Sub-Regional Retail Hierarchy

The Existing Position

2.1 The Regional Spatial Strategy (RPG11) does not define a hierarchy of centres other than by identifying Birmingham City Centre as the regional centre. Below that RPG11 does no more than identify a network of 25 centres which represent the regions main centres, without defining a hierarchy.

2.2 Figure 2.1 below, identifies where Solihull's main retail centres sits within the regional hierarchy of centres in the region that Roger Tym and Partners (RTP) has suggested in their 'West Midlands Regional Spatial Strategy: Regional Centres Study' (2005). RTP currently place Solihull town centre (based only on its comparison goods turnover) as a third tier, or *sub-regional foci town*, and recommend that position should not change outside the RSS review process. Figure 2.1 also suggests where the Borough's other centres sit within the network of centres with Knowle, Shirley, and Chelmsley Wood all arguably performing District Centre roles.

Figure 2.1 Role of Solihull Borough Retail Centres in Sub-Regional Retail Hierarchy



The Future: Retail Development Proposals in Surrounding Settlements

2.3 In recent years, a number of new retail development schemes have been completed in neighbouring local authority areas, most notably in Birmingham (such as Bullring and Mailbox), which have impacted on sub-regional shopping patterns. Key development proposals that are likely to affect the performance of Solihull town and district centres in the future include: further expansion of Birmingham City Centre's retail and leisure offer (including the current application for Martineau Galleries Phase II); expansion of Coventry City Centre's offer; and further development at the NEC (potential casino and leisure uses).

2.4 New developments such as these will lead to further changes in regional shopping patterns which could threaten the vitality and viability of Solihull's retail centres if they are not in a position to adapt and evolve to sustain their own competitiveness in the regional marketplace.

2.5 In addition, planned investment in the Borough's centres (including that promoted by Shirley Advance and by Fordgate in Chelmsley Wood) will impact on the overall vitality and viability of the centres within which they are situated.

3 Solihull Town Centre Health Check

Structure of the Town Centre

Context and Town Centre Boundary

3.1 Solihull town centre is located on the fringe of the West Midlands Conurbation to the west of the Borough, and is a town centre (of growing significance in the regional hierarchy) owing to the volume and quality of its comparison goods offer. It is the administrative and commercial centre for Solihull Borough, and contains the main Council administration functions and extensive private office space. The structure of the centre's retailing is loosely orientated around the linear pedestrianised High Street with the (recent) Touchwood Shopping Centre lying to the south and the 1960's Mell Square development to the north. Extensive office (and hotel) development is found beyond this, to the south and north, with Solihull railway station located to the west on the Chiltern line to London. The Town Centre boundary (using the definition set out in Table 2 of PPS6) of the centre is shown on Plan 1.

3.2 According to the Promis Live Retail Report 2006, Solihull's primary catchment area encompasses the densely populated south eastern part of the West Midlands conurbation, and extends south and westwards into rural Warwickshire (beyond the M40/M42 to include Henley-in-Arden and Ullenhall) and north as far as the M6 and Marston Green. Its main competing centres are Birmingham City Centre, Coventry City Centre and Leamington Spa/Warwick.

Primary and Secondary Frontages (the 'Primary Shopping Area' (PSA))

3.3 The High Street, Mell Square and Touchwood Shopping Centre make up the primary shopping area, with the prime pitch considered to be the Crescent Arcade Mall within Touchwood. Secondary frontages are found on Station Road and Poplar Road, to the west of the main retail area. The PSA boundary (using the definition set out in Table 2 of PPS6) of the centre is shown on Plan 2.

Diversity of Main Town Centre Uses

3.4 Town centre floorspace in Solihull increased significantly in the period 2000-2005 owing to the opening of Touchwood Shopping Centre (developed by Lend Lease) and the completion of an extension to Beatties Department Store. A breakdown of retail floorspace by type, in terms of number of outlets and floorspace is set out in Tables 3.1 and 3.2 below. In order to assess the impact of the Touchwood Shopping Centre, data is provided for the year 2000 as well as 2005 (the most up to date data), and Goad's Great Britain 'national averages' are provided for comparative purposes.

Table 3.1 Retail Composition of Solihull Town Centre - Units

	Units				
	No.		%		
Year	2000	2005	2000	2005	GB Ave
Convenience	17	22	7.8%	7.17%	9.1%
Comparison	117	179	53.7%	58.3%	47.2%
Service	66	86	30.3%	28%	32.2%
Other	9	9	4.1%	2.9%	1.4%
Vacant	9	11	4.1%	3.6%	10.1%
Total	218	307			

Source: Experian Goad, 2000 and 2005

Table 3.2 Retail Composition of Solihull Town Centre – Gross Floorspace

	Gross Floorspace				
	Floorspace		%		
Year	2000	2005	2000	2005	GB Ave
Convenience	6,503sqm (70,000sqft)	8,360sqm (90,000sqft)	12.3%	10.4%	16.7%
Comparison	30,732sqm (330,800sqft)	53,700sqm (578,000sqft)	58.1%	66.6%	52.7%
Service	11,743sqm (126,400sqft)	15,140sqm (163,000sqft)	22.2%	18.8%	21.1%
Other	2,276sqm (25,000sqft)	1,300sqm (14,000sqft)	4.3%	1.61%	1.2%
Vacant	1,644sqm (17,700sqft)	2,140sqm (23,000sqft)	3.1%	2.65%	8.2%
Total	52,899sqm (569,400sqft)	80,640sqm (868,000sqft)			

Source: Experian Goad, 2000 and 2005

3.5 The number of retail units within Solihull town centre increased by 41% between 2000 and 2005 to a total of 307 units (80,640sqm (868,000sqft)), largely due to the completion of Touchwood Shopping Centre. The respective increase in floorspace during this period was 52%.

3.6 The centre has a higher proportion of comparison retailers when compared to the national average. The proportionate role of this sector has continued to expand during the period 2000-2005, which may be partly explained by the overwhelming dominance of such retailers in Touchwood (which opened in 2001). The number of comparison retail units increased by 62 over the 5 year period to 2005 (a 75% increase in comparison floorspace), which included the opening of a John Lewis department store.

3.7 The growth of the convenience, service, and other retail sectors in the town has not kept pace with the growth in comparison goods shopping, and their current role in the town centre (as a proportion of total floorspace) is now much lower than when compared to 2000, and all fall below national average rates of representation. This is more a reflection of the rapid and significant growth of the comparison goods sector in the centre than it is an indicator of a problem with the range and mix of uses in the town centre. The centre still contains major foodstores (Morrison and Sainsbury) and has a significant evening economy.

3.8 It is clear from the above that the role of Solihull has changed significantly during the period 2000 to 2005 and is now focussed predominantly on comparison goods, with a particular emphasis on fashion. This can be largely attributed to the opening of Touchwood Court.

3.9 In addition to improvements in comparison goods shopping provision in the town centre in recent years, the area contained within the town centre boundary contains a significant amount and variety of alternative uses, including:

- Offices, predominantly along Homer Road and including major occupiers such as the Council and Taylor Woodrow;
- Leisure and cultural uses including the cinema at Touchwood; and
- Municipal uses including council offices, library, police stations and magistrates court.

Retailer Representation

Convenience

3.10 Sainsbury's and Morrisons both occupy large town centre stores (2,440sqm (26,260sqft) and 3,830sqm (41,230sqft) gross respectively), which are supplemented by a food hall at Marks and Spencer. Further convenience retail is limited to a very small number of independent retailers (greengrocers, bakeries etc).

3.11 Key convenience retailers absent from the centre include Waitrose, Tesco and Asda.

Comparison

3.12 The centre has a broad and high quality comparison retail offer, particularly with regard to fashion goods. Anchor stores include John Lewis and Beatties (House of Fraser). Touchwood shopping centre is very much orientated towards fashion multiples, with a broad offer ranging from mid-market operators (such as Gap, H&M, Next) to higher value operators including Gant, Mexx and Planet. Mell Square contains a higher proportion of non-fashion comparison retailers which include Woolworths and Boots, and is also home to Marks and Spencer. The comparison offer on the High Street is generally made up of wider range of smaller stores that include the greatest concentration of services (banks, estate agents etc).

3.13 Key comparison retailers absent from the centre include Debenhams and Virgin Megastore.

Proportion of Vacant Street Level Property

3.14 Table 3.1 indicates that there are currently 11 vacant units in Solihull town centre. The current level of vacant property amounts to 2,140sqm (23,000sqft), which equates to 2.65% of total gross floorspace. This is significantly lower than the Goad national average vacancy rate of 10.12%, and is a strong indicator of the town centre's viability. The vacant units are spread across the centre, although it is noted that there are no vacant units within Touchwood, which again re-asserts the development's role as the town's prime shopping centre. The average size of the vacant units is 194sqm (2,090sqft) which is comparable to the overall average of all units in the centre (263sqm (2,831sqft)).

Shopping Rents

3.15 Prime retail rents in Touchwood (Crescent Arcade) are in the region of £205/sqft Zone A, while non-prime areas of the centre, while still considered part of the primary frontage, achieve Zone A rental values of circa £150/sqft. The highest rents on the High Street are achieved for those units on the southern side in between the entrances to Touchwood, which typically range between £140 and £145/sqft Zone A. Top rents in Mell Square are understood to be in the region of £130-£150/sqft Zone A. (Source: PROMIS). A snapshot of currently available retail properties is provided in Table 3.3, below:

Table 3.3 Current Availability

Location	Agent	Size	Rental Value (per annum)
Mell Square	Gooch Suncliffe Whale	632sqm (6,800sqft)	£275,000
Mell Square	Gooch Suncliffe Whale	511sqm (5,500sqft)	£125,000
Drury Lane	Alston Noch	51sqm (550sqft)	£18,500
Station Road	Andrew Thompson and Co	68sqm (730sqft)	£34,500

Source: GVA Grimley, 2006

3.16 In order to place these rental values in a sub-regional context, Table 3.4 below provides rental value information for other local comparable centres:

Table 3.4 Prime Zone A Retail Values in Solihull and Surrounding Centres

	Centre	Prime Zone A Rental Value (per sqft)
Regional Centre	Birmingham	£325
Sub-Regional Centres	Merry Hill	£265
	Coventry	£165
	Leicester [East Mids]	£210
Comparable Centres	**Solihull**	**£205**
	Worcester	£160
	Leamington Spa	£115
	Redditch	£115
	Stratford-Upon-Avon	£130
	Sutton Coldfield	£125
Other Lower Order Centres in Solihull Borough	Shirley	£50
	Chelmsley Wood	£50
	Knowle	£N/A

Source: Colliers CRE, 2006

3.17 Table 3.4 demonstrates that Prime Zone A rents in Solihull exceed those being achieved in Worcester, Wolverhampton and Coventry and are similar to those achieved in Leicester, which demonstrates the centre's strong position against centres that are normally at the same tier in the hierarchy of centres suggested by RTP in the Regional Centres Study. The higher achievable rents in Birmingham are to be expected, given its higher order status in the retail hierarchy, and the values achieved in Merry Hill demonstrate the commercial attractiveness of purpose built freestanding malls.

Commercial Yields on Non-Domestic Property

3.18 In examining the strength of commercial property indicators in Solihull, commercial yield data has also been gathered to supplement the information surrounding rental values, which is a valuable indicator of retail viability. Table 3.5 outlines typical yields recorded for Solihull in the period since 2000 (ie prior to the opening of Touchwood), along with those from competing and neighbouring centres.

Table 3.5 Retail Property Yields in Solihull and Surrounding Centres

Location	2000	2001	2002	2003	2004	2005
Birmingham	5%	5%	5%	4.75%	5%	5%
Coventry	5.25%	5.25%	5.25%	5.25%	5.25%	5.25%
Solihull	**5%**	**5%**	**5%**	**5%**	**5%**	**4.75%**
Sutton Coldfield	7%	7%	7%	7%	7%	7%
Leamington Spa	5.25%	5.5%	5.5%	5.5%	5.5%	5.25%

Source: Valuation Office, 2006

3.19 Table 3.5 suggests that Solihull town centre is subject to strong investor confidence, give its consistently low commercial yields. Of note is that Solihull has performed better than centres higher up in the retail hierarchy, most notably Birmingham City Centre, but also including Coventry. This suggests that from a commercial property point of view, Solihull represents a low risk, high performing centre.

Retailer Representation and Intention to Change Representation

3.20 The Focus database (March 2006) indicates strong demand from retailers seeking representation in Solihull town centre, with a total of 95 requirements (note this excludes requirements for out-of-town representation). With the exception of a short term fall in requirements in 2001 (which coincides with the opening of Touchwood) and 2006, overall retailer interest has steadily increased year-on-year since 2000. The database suggests that demand is mainly from comparison retailers (which reflects the centre's existing characteristics), and includes Debenhams and TK Maxx. However, of note is that 23% of requirements are for restaurants/bars/cafes/fast food, which is significantly higher than the existing provision (9% of all units). This is an interesting feature and will need to be taken into account in proposals for growth of the existing centre. Table 3.6 below, compares requirements in Solihull with those for other centres.

Table 3.6 Retailer Requirements in Solihull and Comparable Centres (in-town requirements only)

Location	Conv.	Comp.	Services	Other	Total (no.)	Total (minimum)
Solihull	**2**	**61**	**31**	**1**	**95**	**29,800sqm (320,770sqft)**
Coventry	2	39	27	0	68	17,569sqm (189,100sqft)
Leamington Spa	3	48	21	0	72	22,601sqm (243,300sqft)
Sutton Coldfield	2	39	9	1	51	18,080sqm (194,600sqft)

Source: Valuation Office, 2006

3.21 As Table 3.6 demonstrates, there are more retailers seeking representation in Solihull town centre than in other centres of comparable size in the region, with the exception of Birmingham City centre. When translated into minimum floorspace, providing for the existing interest would involve increasing the centre's floorspace by a further 37%. This ongoing demand for space, which has been sustained over several years is a strong indicator of vitality and suggests that the centre's position in the retail hierarchy is robust going forward.

The Potential Capacity for Growth or Change of Centres in the Network

3.22 From a commercial point of view there appears to be potential capacity for the growth of Solihull town centre's role, owing to the spending power of its catchment. This is supported by PPS6 which encourages new town centre uses (including leisure and offices) to be developed within town centres, as opposed to out of centre or edge of centre locations. There are no obvious development sites of any scale within, or adjacent, to the town centre, therefore physical expansion would largely involve redevelopment of existing buildings or more intensive use of the existing provision. Owing to the proximity and strategic role of Birmingham as the regional capital (and its higher position in the retail hierarchy), and the need to regenerate other centres in the region, this study will have to consider fully the appropriate level of future growth in the context of Solihull's existing and future role within the required hierarchy.

Accessibility

Car

3.23 Strategic access to Solihull town centre by car is excellent. It lies within 2 miles of the M42 (J5), which links into the M6 and M42 to the north and south of the Borough to provide easy access to the centre's wide catchment area. The A41 provides access into Birmingham City Centre, although peak time congestion (particularly within the 'motorway box') is acknowledged as a regional problem. 6000 parking spaces, which typically charge around 90p per hour, serve the centre, and congestion leading into the town centre can also be a problem at peak periods. Compared to other centres, the provision of car parking spaces is particularly high, as demonstrated in Table 3.7:

Table 3.7 Comparative Parking Provision Ratios (excludes on-street parking)

Location	Gross Retail Floorspace	Centre Parking Spaces	Square Metres of Gross Retail Floorspace per Parking Space
Solihull	**80,640sqm**	**6000**	**13**
Cannock	39,950sqm	1,600	25
Stafford	63,840sqm	2,200	29
Wolverhampton	135,930sqm	2,200	62
Reading	245,000sqm	7,200	34

Source: Experian Goad 1999 and 2006, Town Centre websites,

Public Transport

3.24 Solihull town centre is served by a total of 35 bus lines which operate routes throughout the south eastern part of the West Midlands Conurbation, including numerous services to Birmingham City Centre, and links to the villages of mid-Warwickshire. Services operate at frequencies of between <10 and 30 minutes during peak times, the most frequent services being those operating between Birmingham City Centre and Solihull. There are limited bus priority measures in the surrounding area and peak time congestion causes slow journey times. The vehicle fleet is reasonably modern although the quality of provision, in terms of passenger comfort, is poor. Bus stops and waiting facilities are mainly located on Station Road and Poplar Road (which are bus only routes), with some services stopping at the eastern end of the High Street, which together provide good access into the primary retail area. Waiting facilities appear well maintained, although public transport information is limited, and there is no currently no real time information capability. It is our understanding that there are no existing (or proposed) Bus Showcase routes serving Solihull town centre (although such services do serve other centres within the Borough).

3.25 Solihull rail station lies approximately 500m from the edge of the secondary retail area, and circa 700m from the central point of the town centre. From the station, Central Trains and Chiltern Railways operate services into Birmingham Snow Hill (and Moor Street) (journey times of 10-20 minutes), and out to Dorridge, Leamington Spa and London Marylebone (circa 2 hours) at peak time frequencies of up to 4 per hour. A key issue for the study will be to consider how pedestrian linkages between the railway station and town centre could be improved as they are currently bisected by busy highways.

Bicycle

3.26 Provision of facilities for cyclists within Solihull town centre is poor, and limited to basic cycle stands. There is a notable absence of cycle lanes along the main routes into the centre, which, owing to congestion, are likely to be inhospitable to cyclists for much of the time. Furthermore, cycling is prohibited along the pedestrianised High Street and Mell Square areas, which limits cyclist accessibility within the centre in addition to poor access into it.

Pedestrians

3.27 The majority of Solihull town centre is vehicle free therefore pedestrian accessibility within the centre is particularly good in the most part. However, buses penetrate the centre via Poplar Road/Station Road and this does create some pedestrian/vehicle conflict which the study should seek to address.

Disabled Access

3.28 The provision of (mainly) wheelchair accessible buses and trains, and disabled parking spaces in all major car parks (where no charge is levied), assist access to the centre for those with disabilities. A shopmobility scheme operates from two locations, one in Mell Square and one in Touchwood, which offer free use of mobility equipment (motorised scooters, powerchairs, and wheelchairs) and a shopping companion service for those with limited mobility (following registration). Accessibility within the centre is further helped by its largely purpose built and pedestrianised nature, which provides mainly step-free access to the majority of shops and services, away from the hazards of motor vehicles.

Conclusion

3.29 Overall, the centre caters reasonably well for car users, and for pedestrians once within the centre, although congestion on roads leading to the centre can be an issue. In terms of public transport options, the rail station is located some distance from the primary retail area and the quality of the bus services is notably poor, and therefore public transport does not pose an especially attractive alternative to the car. Furthermore, very limited provision is made for cyclists, discouraging this as a transport option. These issues will need to be tackled in the study outcomes.

Perception of Safety and Occurrence of Crime

3.30 The 2004 Solihull Crime and Drugs audit (undertaken by the Solihull Crime and Disorder Reduction Partnership) revealed that the fear of crime across the borough was higher than the actual experience of crime. Occurrences of crime within Solihull Borough are broadly similar to the English average, as demonstrated in Table 3.8, and significantly lower than for the rest of the West Midlands Conurbation. Notwithstanding this, recorded crime is not evenly distributed across the borough with northern wards generally experiencing around double the amount of crime as those in the south of the borough, and the NEC acting as a focus for crime and disorder. The audit identified Solihull town centre as a 'hot spot' for crime within the borough, where the highest number of offences per head of population are recorded compared to anywhere else in (the borough), excluding the ward of Bickenhill (which incorporates the NEC).

Table 3.8 Crime Statistics

	Crime Statistics per 1,000 population		Crime Indices	
	English Average	Solihull Borough	Borough Mean	St.Alphege ward (Solihull town Centre)
Violence against the person	16.5	15	1.0	2.6
Robbery offences	1.4	3	1.0	2.6
Theft of a motor vehicle offences	4.5	4	1.0	0.4
Burglary dwelling offences	6.4	6	1.0	0.8
Theft from a vehicle offences	10	13	1.0	0.7

Source: National Statistics, and West Midlands JDT (2005)

3.31 Table 3.8 demonstrates that robbery and violent crime are particularly common in the town centre, however, of note are low rates of car crime. The 2004 audit noted high rates of the following offences within the town centre:

- Alcohol related late-night violence (particularly at weekends);
- High incidence of drug offences; and
- Robbery (from persons and shops).

3.32 It is not surprising that the town centre is a focus for anti-social behaviour given its concentration of leisure uses and the fact that it attracts large volumes of people (who are non-resident of the town centre), as is typical for vital and viable town centres. Consequently, the data suggesting that the town centre is a crime 'hot spot' should be treated with caution.

State of Town Centre Environmental Quality

3.33 The majority of the town centre is pedestrianised; well landscaped with numerous trees and flower pots; subject to good quality surface materials and street furniture; and contains reasonably attractive architecture. Importantly, the centre is particularly well maintained which may, in part, be due to the high proportion of privately managed space and high-end target market of many of the retailers. The centre is compact and does not suffer from unsightly or polluting neighbours, and benefits from reasonable air quality (given the absence of cars from most of the centre).

Strengths, Weaknesses, Opportunities and Threats (SWOT) Assessment

3.34 Based on the above analysis, a SWOT assessment has been undertaken in order to summarise the position:

Strengths	**Weaknesses**
▪ Broad retail offer including an excellent range of high quality comparison retailers ▪ Good representation of multiple retailers (comparison) ▪ High quality and well maintained built environment ▪ CCTV ▪ Extensive low-cost car parking ▪ Good air quality ▪ Excellent pedestrian access within centre ▪ High volume (and frequent) bus services linking centre with wide geographical area ▪ Nearby rail access ▪ High daytime population due to extensive edge-of-centre office developments and education institutions	▪ Access via alternatives to the car not attractive ▪ Congestion on roads leading to the centre at peak times ▪ Quality of buses serving the centre are poor (in terms of passenger comfort) ▪ Poor linkages between rail station and centre ▪ Inadequate provision for cyclists ▪ Limited evening economy ▪ Few independent retailers ▪ Limited convenience retail ▪ Conflict between buses and pedestrians in Western part of centre ▪ Absence of development sites
Opportunities	**Threats**
▪ Town centre living (including LOTS) ▪ Develop evening economy ▪ Improve linkages between rail station and centre (or potential to relocate station) ▪ Better provision for cyclists within centre and surrounding routes	▪ Further development of Birmingham and Coventry City Centres as more dominant retail centres ▪ Further development of NEC for leisure and retail uses ▪ Growth in out-of-town retailing ▪ Increased traffic congestion (local roads and

▪ Upgrading of Mell Square ▪ Potential, longer term, to expand Touchwood Centre ▪ Scope to rationalise public sector estate	motorway network) ▪ National/regional economic decline ▪ Policy framework prevents ability of centre to maintain/improve its retail position and/or respond to changing market requirements

Key Messages

- The town centre has an established principal role as a comparison retail and service centre;
- There is consumer, developer and retailer demand to increase the amount and quality of retail floorspace in the centre;
- There is considerable opportunity to further develop the centre's evening economy;
- The existing town centre residential market is limited, however offers opportunity for further expansion;
- Alternative means of access to the car are currently unattractive and require addressing;
- Further strategies are required to tackle anti-social behaviour and theft within the centre;

4 Shirley District Centre

Structure of the Town Centre

Context

4.1 Shirley is situated to the west of the Borough and is categorised as a district centre owing to the volume and range of its retail provision and other uses (as per the definitions in Table 1 of PPS6). It is a linear centre that creates a corridor of commercial development along the A34 (a major arterial route linking the M42 (J4) with Birmingham City Centre), and serves a local catchment area covering south-east Birmingham and western Solihull. Its main competing centres are Solihull town centre and Birmingham City Centre, particularly with regards to comparison retail, and Acocks Green District Centre for convenience goods, along with other district centres in the vicinity, such as Hall Green and Kings Heath. The District Centre boundary (using the definition set out in Table 2 of PPS6) of the centre is shown on Plan 3.

Primary and Secondary Frontages (The Primary Shopping Area (PSA))

4.2 On the eastern side of Stratford Road, the primary frontage stretches from the Red Lion Pub in the north to Morrisons supermarket in the south. This position is broadly mirrored on the western side, stretching from Woolworths in the north to the Renault dealership in the south. The secondary retail frontage extends northwards on both sides of the road as far as the junction with Haslucks Green Road/Olton Road, and south to School Road/Union Road. There is a large Tesco store immediately to the north of the town centre and a large Sainsbury's (and associated retail park) immediately to the south. The PCA boundary (as set out in Table 2 of PPS6) of the centre is shown on Plan 4.

Diversity of Main Town Centre Uses

4.3 The volume of retail floorspace in Shirley has remained relatively constant over recent years therefore floorspace data is provided for 2005 only in Table 4.1 below. It is understood that the most recent significant developments were American Golf in 1998 (323sqm(3,477sqft)) and Morrisons in 1986 (2787sqm (30,000sqft)).

Table 4.1 Retail Composition of Shirley District Centre

	Units			Gross Floorspace		
	No.	%	GB Ave	Floorspace	%	GB Ave
Convenience	18	10.3%	9.1%	9,290sqm (100,000sqft)	26.8%	16.7%
Comparison	77	44.2%	47.2%	13,940sqm (150,000sqft)	40.2%	52.7%
Service	68	39.1%	32.2%	9,480sqm (102,000sqft)	27.4%	21.1%
Other	2	1.2%	1.4%	370sqm (3,980sqft)	4.6%	1.2%
Vacant	9	5.2%	10.1%	1,580sqm (17,000sqft)	1.1%	8.2%
Total	174			34,660sqm (373,080sqft)		

Source: Experian Goad, 2005

4.4 The mix of retail types in terms of unit numbers is broadly similar to the average Goad 'national average', although the centre has a higher than average proportion of convenience retailing. This is quite normal for District Centres which by their nature tend to cater for primarily 'local' convenience shopping needs with higher order comparison goods being sold from higher order centres.

Retailer Representation

Convenience

4.5 Convenience retail representation within the town centre includes Aldi, Marks and Spencer Simply Food, Morrisons, and Iceland. Morrisons (formerly Safeway), which is located to the south of the centre, extends to 5,050sqm (54,350sqft), has its own car park and offers a wide range of convenience products (plus some comparison goods in addition). The Aldi store is also located to the south of the centre, and like Morrisons benefits from its own car park, although is significantly smaller at 1,410sqm (15,200sqft). Several independent operators that include butchers, greengrocers and specialist delicatessens supplement this offer, as well as a small farmers market. Overall, the convenience retailers (both multiples and independent) were observed to be well used, particularly the larger supermarkets.

4.6 Key convenience retailers absent from the town centre include Asda, Tesco, Sainsbury's and Waitrose, although it is noted that there is a large Tesco store immediately to the north of the centre and a Sainsbury's to the south.

Comparison

4.7 The key multiple comparison retailers present in Shirley are Boots and Woolworths, which are supplemented by a range of smaller specialist operators offering mainly non-fashion/clothing lines. Local and regional operators make up the remaining comparison retail offer which, owing to their broad product range, appeal to a wide market.

4.8 In addition to the comparison retailers there is a reasonably wide selection of high street banks, building societies, estate agents and hairdressers distributed throughout the primary and secondary shopping area. The evening economy is limited to the Saracen's Head public house (Beefeater) and a very limited selection of fast food takeaways (independents and multiples) and bars/restaurants. However, of note is the presence of a Premier Travel Inn.

Proportion of Vacant Street Level Property

4.9 Table 4.1 indicates that there a currently 9 vacant retail units in Shirley District Centre, which equates to 1,580sqm (17,000sqft), or 5% of total floorspace.

Shopping Rents

4.10 Table 4.2 provides a snapshot of currently available property in Shirley.

Table 4.2 Current Availability

Location	Agent	Size	Rental Value (per annum)	£/sqm (sqft)
Stratford Road	Brasier Harris	68sqm (732sqft)	£15,520	£228.23 (£21.26)
Stratford Road	Alston Nock	93sqm (1000sqft)	£40,000	£430.10 (£40.00)
Stratford Road	Wright Silverwood	94sqm (1,011sqft)	£9,000	£95.74 (£8.91)
Stratford Road	Wright Silverwood	63sqm (680sqft)	£20,000	£317.46 (£29.62)
Stratford Road	Wright Silverwood	309sqm (3,326sqft)	£70,000	£226.53 (£21.00)
Stratford Road	Stephens McBride	55sqm (592sqft)	£18,750	£340.90 (£31.51)

Source: GVA Grimley, 2006

4.11 For comparative purposes, Zone A rents for the above properties are estimated to be in the region of £30-50/sqft, depending on quality, configuration and pitch. Table 4.3 below compares rental values being achieved in Shirley with other similar and, in some case, competing centres.

Table 4.3 Prime Zone A Retail Values in Shirley and Surrounding Centres

	Centre	Prime Zone A Rental Value (per sqft)
Regional Centre	Birmingham	£325
Sub-regional Centre	Solihull	£205
Comparable town and district centres	**Shirley**	**£50**
	Chelmsley Wood	£50
	Acocks Green	£50
	Kings Heath	£70
	Halesowen	£65
	Kenilworth	£35
Other Lower Order Centres in Solihull Borough	Knowle	£N/A

Source: Colliers CRE, 2006

4.12 As would be expected, retail floorspace values in Shirley are significantly lower than in the higher order centres of Solihull and Birmingham City Centre. However, when compared to similarly sized centres, prime rental values in Shirley are roughly average, which suggests reasonable vitality.

Commercial Yields on Non-Domestic Property

4.13 Due to limited transactions there is not sufficient data available to provide meaningful average yields that would be representative of the centre as a whole. Notwithstanding this, Table 4.4 provides a breakdown of recent transactions to provide an indication of current yields.

Table 4.4 Recent Retail Property Transactions in Shirley

Location	Date of Transaction	Size	Sale Price	Achieved Rent	Rent (£/sqft)	Yield
201 Stratford Road (Primary Frontage)	February 2006	167sqm (4,799sqft)	£1,250,000	£57,700	£12.02	4.56%
239 Stratford Road (Primary Frontage)	Feb/March 2004	440sqm (4,731sqft)	£1,035,000	£55,900	£11.82	5.4%
Office World (Secondary Frontage)	October 2003	866sqm (9,318sqft)	£2,350,000	N/A	N/A	6.19%
Burger King (Secondary Frontage)	July 2003	344sqm (3,703sqft)	£2,260,000	£166,319	£44.91	7.36%

Source: Focus, 2006

4.14 Table 4.4 demonstrates that recent transactions have achieved yields of between 4.56% and 7.36%. This range of yields is higher than those applicable for Solihull town centre or Birmingham City Centre for example, but this should be expected given its lower order status as a district centre. Compared to national average rates, this data suggests that from a commercial property point of view, Shirley represents a relatively low risk and reasonably well performing centre.

Retailer Intention to Change Representation

4.15 There are currently a total of 10 retailers seeking representation within Shirley District Centre. 5 of these requirements are for comparison retailers, 2 convenience retail, and 3 for service retailers. The interest amounts to a minimum 1,505sqm (16,200sqft) of retail floorspace. When compared to other local comparable centres this level of demand is broadly average, and suggests that, based on retailer interest, the centre should remain competitive against other centres going forward. Indeed, if the Shirley Advance proposals materialise then Shirley's overall offer will be enhanced significantly, improving the centre's competitiveness (see below).

Table 4.5 Retailer Requirements in Solihull and Comparable Centres (in-town requirements only)

Location	Conv.	Comp.	Services	Other	Total (no.)	Total (minimum)
Shirley	**2**	**5**	**3**	**0**	**10**	**16,200sqm (174,400sqft)**
Chelmsley Wood	1	3	0	0	4	11,100sqm (119,480sqft)
Knowle	0	1	0	0	1	400sqm (4,305sqft)
Kings Heath	2	9	6	0	17	26,600sqm (286,300sqft)
Acocks Green	0	8	0	0	8	12,850sqm (138,300sqft)
Kenilworth	0	6	7	0	13	19,750sqm (212,600sqft)

Source: Focus, 2006

The Potential Capacity for Growth or Change of Centres in the Network

4.16 A planning application has been submitted in April 2006 for the mixed use 'Shirley Advance' development proposal on land to the rear of Stratford Road and Haslucks Green Road. The proposed retail element will be anchored by a 6,515sqm (70,100sqft) Asda food store with a further 11,721sqm (126,160sqft) of further retail and restaurant space over 2 floors. The development will incorporate a 650 space basement shoppers car park, 138 residential apartments and a 50 unit retirement living building. The development will be integrated into the existing town centre through significant public realm development, including a series of new public squares.

4.17 The increase in the centre's retail floorspace will enable it to move up the ranking of retail centres, although it is unlikely that this will change its position in the regional retail hierarchy. Equally, it is likely that it will remain considered as a district centre, albeit a large one.

Accessibility

Car

4.18 Access to Shirley district centre by car from its catchment is good, although surrounding roads (particularly the A34) suffer from congestion during peak hours. There are 8 car parks in the centre which provide free parking for circa 900 cars, the largest being to the rear of Iceland (170 spaces) and above Morrisons (240 spaces). These car parks are supplemented by circa 105 on-street spaces, which again are not metered. The level of car parking provision is (in relation to retail floorspace) significantly lower than that for Solihull, however similar to Chelmsley Wood which plays a similar role in the retail hierarchy. (The Shirley Advance proposals will add a further 650 spaces to the existing total).

Table 4.6 Comparative Parking Provision Ratios (excludes on-street parking)

Location	Gross Retail Floorspace	Centre Parking Spaces	Square Metres of Gross Retail Floorspace per Parking Space
Solihull	80,640sqm	6000	13
Shirley	**34,660sqm**	**900**	**38.5**
Chelmsley Wood	23,320sqm	676	34.5
Knowle	14,210sqm	260	54.7

Source: Experian Goad 2006

Public Transport

4.19 Shirley District Centre is served by a total of 12 bus lines which mainly operate along the Stratford Road to and from Birmingham City Centre. Notwithstanding this there are 2 east-west services that provide links to Solihull town centre and Northfield/Woeley Castle. Services operate at frequencies of between <10 and 30 minutes during peak times, the most frequent being those running to Birmingham City Centre. Bus priority measures on the surrounding road network are very limited and peak time congestion causes slow journey times. The vehicle fleet is reasonably modern, although the quality of provision, in terms of passenger comfort, is poor. Bus stops and waiting facilities are located in the heart of the centre and are adequately maintained, although only basic public information is provided and there is currently no real time information capability. It is understood that there are no proposed Bus Showcase routes for this area.

4.20 Shirley rail station is in excess of 1km from the district centre, therefore does not provide a practical means of direct access to the centre.

Bicycle

4.21 Provision for cyclists within Shirley town centre is inadequate, and largely limited to a single stretch of cycle path of less than 100m in length (running parallel to Stratford Road). There is a notable lack of cycle lanes on Stratford Road, which owing to its narrow lanes and congestion is particularly unsuitable for cyclists. As the main access route into the centre, this acts as a strong deterrent to people potentially choosing this mode of transport.

Pedestrians

4.22 Pedestrian access in a north-south direction is adequate, however the Stratford Road creates a physical barrier against movement in an east-west direction. There are several pelican crossings however pedestrians' crossing the road in other locations occurs frequently creating hazardous conditions for motorists and pedestrians alike.

Disabled Access

4.23 The provision of (mainly) wheelchair accessible buses, and allocated disabled parking spaces, assist access to the centre for those with disabilities. Accessibility within the centre is difficult owing to the barrier created by Stratford Road and the large number of east-west cross streets that require crossing in order to move in a north-south direction. The proposed Shirley Advance retail scheme includes a shop mobility function.

Conclusion

4.24 Overall, the centre caters well for car users in terms of extensive free parking, however accessibility is limited during peak periods due to congestion. Access to the centre by bus provides the only realistic alternative to the car at present, given the distance of the rail station and inadequate provision for cyclists, and it is acknowledged that pedestrian access from surrounding residential areas is good.

Perception of Safety and Occurrence of Crime

4.25 As already noted, the fear of crime in Solihull exceeds the actual occurrence of crime. Shirley District Centre lies within the wards of Shirley West and Shirley East, where crime rates are generally below the average for Solihull borough, as demonstrated in Figure 4.7.

Table 4.7 Crime Statistics

	Crime Statistics per 1,000 population		Crime Indices		
	English Average	Solihull Borough	Borough Mean	Shirley West	Shirley East
Violence against the person	16.5	15	1.0	0.6	1.0
Robbery offences	1.4	3	1.0	0.7	0.9
Theft of a motor vehicle offences	4.5	4	1.0	0.8	0.8

Burglary dwelling offences	6.4	6	1.0	1.2	0.7
Theft from a vehicle offences	10	13	1.0	0.9	0.8

Source: National Statistics, and West Midlands JDT (2005)

4.26 Shirley district centre is not considered to be a crime hot spot, although will be subject to higher rates of specific crimes associated with centres (theft from shops etc). Other typical town centre offences such as alcohol related violence are likely to be lower than other centres, such as Solihull, owing to the relatively limited evening economy in Shirley. Overall, the statistics set out in Table 3.7 reflect the trend for lower crime rates in the south of the borough, and suggest that Shirley district centre experiences relatively low crime rates.

State of Town Centre Environmental Quality

4.27 The district centre is well landscaped with numerous trees and flower pots and has good quality surface materials and street furniture. In addition, buildings reflect a mix of architectural styles, and are reasonably well maintained. Notwithstanding this, the Stratford Road, given that it divides the centre, has a significant negative impact on the centre's environment in terms of noise pollution, air pollution and visual intrusion.

Strengths, Weaknesses, Opportunities (SWOT) Assessment

4.28 Based on the above analysis, a SWOT assessment has been undertaken in order to summarise the position:

Table 4.8 Shirley SWOT Analysis

Strengths	Weaknesses
Number & variety of independent retailers	Obstacle created by Stratford Rd in terms of pedestrian/traffic conflict
Free car parking available in several locations	Elongated nature of centre discourage walking/makes links difficult
Choice and access to convenience shopping	Poor provision of leisure cultural activities i.e. bars, restaurants, cinema etc
Accessibility by a variety of transport modes	Lack of focal point within the main part of the centre
Improving public realm – landscaping, pedestrian provision (SETS) etc	Lack of modern retail units that would attract well known retailers
	Road congestion/dominance of traffic
Opportunities	**Threats**
Create depth to the currently linear frontage to give focus to the centre	Competition from out of town retail parks
Improve pedestrian/traffic conflict and congestion	Competition from other large centres (Birmingham/Solihull)
Improve leisure/cultural offer	Road congestion
Forge better links with the park, currently anonymous from main part of centre, given proximity	

Key Messages

- Shirley has a vital and viable role as a convenience retail centre serving a local catchment. This role should be sustained through further retail development which should aim to support its existing position in the retail hierarchy and diversify its comparison offer;
- There is developer and retailer demand to increase floorspace within the centre (as demonstrated by the Shirley Advance proposals);
- Alternative means of access other than the car are currently unattractive and require addressing; and
- There is opportunity to develop the centre's evening economy.

5 Chelmsley Wood District Centre

Structure of the Centre

Context

5.1 Chelmsley Wood district centre is located on the fringe of the West Midlands conurbation to the north of the Borough, and is categorised as a district centre that serves the day to day needs of the surrounding residential area of Chelmsley Wood. This is a purpose built centre (opened in 1971), which was developed in conjunction with the large scale development of this area for mainly local authority housing in the 1960's and 70's. The style of the centre reflects many of the (now unpopular) trends that were prevalent during this period, including pedestrian and vehicular segregation (including overhead walkways), the use of experimental building methods, and the overwhelming use of concrete as a building material. The centre is elevated above ground level and is inward looking, where shops front onto a network of internal walkways, while a blank concrete façade faces the street. The perimeter of the centre is defined by an orbital service road, beyond which lie a series of car parks and non-retail uses. The centre boundary (using the definition set out in Table 2 of PPS6) of the centre is shown on Plan 5.

Primary and Secondary Frontages (the Primary Shopping Area (PSA))

5.2 Chesnut Walk, Maple Walk and Greenwood Way represent the primary retail frontage, although the rest of the centre is only slightly secondary to this. There are no retail uses beyond the centre, which is a predominantly residential area. The PSA boundary (using the definition set out in Table 2 of PPS6) of the centre is shown on Plan 6.

Diversity of Main Town Centre Uses

5.3 The volume of retail floorspace in Chelmsley Wood has remained relatively constant over recent years, the most recent development being the completion of the wing now occupied by Wilkinsons and Kwik-Save in 1977. Table 5.1 sets out the retail composition of the centre:

Table 5.1 Retail Composition of Chelmsley Wood District Centre

	Units			Gross Floorspace		
	No.	**%**	**GB Ave**	**Floorspace**	**%**	**GB Ave**
Convenience	11	16.9%	9.1%	7,150sqm (77,000sqft)	30.7%	16.7%
Comparison	35	53.8%	47.2%	12,170sqm (130,950sqft)	52.2%	52.7%
Service	10	15.4%	32.2%	1,770sqm (19,050sqft)	7.6%	21.1%
Other	1	1.5%	1.4%	190sqm (2,045sqft)	0.8%	1.2%
Vacant	8	12.3%	10.1%	2,040sqm (22,000sqft)	8.8%	8.2%
Total	65			23,320sqm (251,000sqft)		

Source: Experian Goad, 2006

5.4 The mix of retail types in terms of unit numbers is broadly similar to the Goad national average albeit with a higher than average proportion of convenience retailing. This is quite normal for District Centres which by their nature tend to cater for primarily 'local' convenience shopping needs with higher order comparison goods being sold from higher order centres.

Retailer Representation

Convenience

5.5 Convenience retailer representation in the centre includes Kwik-Save and Iceland along with a small number of independent retailers, all of which appeared well used. None of the major supermarkets are currently represented in the centre.

Comparison

5.6 Key multiple comparison retailers present in Chelmsley Wood include Argos, Boots and Woolworths. These are supplemented by a range of multiple and independent operators offering a broad range of comparison goods including fashion and electrical products, which a re typically focussed on the low value sector of the market. 3 major banks/building societies are represented in the centre as well as ancillary services such as travel agents. The centre's evening economy is limited to a small number of hot food takeaways.

Proportion of Vacant Street Level Property

5.7 The centre suffers from a vacancy level that is above the British average and significantly higher than Solihull Borough's other retail centres. In total 8 (or 12.3%) of units are vacant (the national average is 10.1%).

Shopping Rents

5.8 Table 5.2, below, provides a snapshot of currently available property in Chelmsley Wood Shopping Centre, while Table 5.3 provides a breakdown of recent transactions

Table 5.2 Current Availability

Location	Agent	Size	Rental Value (per annum)	£/sqm (sqft)
Coppic Way	Donaldsons	186sqm (2,000sqft)	£35,000	£188.17/sqm (£17.50/sqft)
Cedar Court	Phillip Wragg	106sqm (1,143sqft)	£19,700	£185.85/sqm (£17.23)

Source: GVA Grimley, 2006

Table 5.3 Recent Retail Property Transactions in Chelmsley Wood

Location	Date of Transaction	Size	Achieved Rent	£/sqm (sqft)
Shopping Centre	August 2005	42sqm (450sqft)	£22,000	£523.80/sqm (£48.89/sqft)
Shopping Centre	January 2005	102sqm (1,089sqft)	£49,005	£480.44/sqm (£45.00/sqft)
Shopping Centre	November 2005	329sqm (3,539sqft)	£39,500	£120/sqm (£11.16/sqft)
Maple Walk	August 2003	862sqm (9,275sqft)	£102,100	£118.44/sqm (£11.08/sqft)
Greenwood Square	August 2003	418sqm (4,500sqft)	£60,000	£143.54/sqft (£13.33/sqft)

Source: Focus, 2006

5.9 For comparative purposes, the above rental values suggest that Zone A rents for the above properties would be in the region of £30-50/sqft. Table 5.4 sets out Prime Zone A rental values in Chelmsley Wood in the context of comparable centres, and demonstrates that achievable values are, on the whole, similar to other district centres in the vicinity, which suggests a degree of vitality.

Table 5.4 Prime Zone A Retail Values in Chelmsley Wood and Surrounding Centres

	Centre	Prime Zone A Rental Value (per square foot)
Regional Centre	Birmingham	£325
Sub-regional Centre	Solihull	£205
Comparable town and district centres	Shirley	£50
	Chelmsley Wood	**£50**
	Acocks Green	£50
	Kings Heath	£70
	Halesowen	£65
	Kenilworth	£35
Other Lower Order Centres in Solihull Borough	Knowle	£N/A

Source: Colliers CRE, 2006

Commercial Yields on Non-domestic Property

5.10 It is understood that the shopping centre is owned entirely by Chelmsley Wood Properties. Consequently, there are no freehold transaction records for individual units upon which to gauge prevalent yields.

Retailer Representation and Intention to Change Representation

5.11 There are a total of 4 retailers seeking representation within Chelmsley Wood district centre. Comparison retailers include Priceless Shoes and Card Warehouse, as outlined in Table 5.5 below. With the exception of Knowle, the level of interest is lower than the comparable centres in the area which places Chelmsley Wood in an uncompetitive position going forward.

Table 5.5 Retailer Requirements in Chelmsley Wood and Comparable Centres (in-town requirements only)

Location	Conv.	Comp.	Services	Other	Total (no.)	Total (sqft) (minimum)
Shirley	2	5	3	0	10	1505sqm (16,200sqft)
Chelmsley Wood	**1**	**3**	**0**	**0**	**4**	**1,031sqm (11,100sqft)**
Knowle	0	1	0	0	1	37.2sqm (400sqft)
Kings Heath	2	9	6	0	17	1,542sqm (26,600sqft)
Acocks Green	0	8	0	0	8	1,194sqm (12,850sqft)
Kenilworth	0	6	7	0	13	1,835sqm (19,750sqft)

Source: Focus, 2006

The Potential Capacity for Growth or Change of Centres in the Network

5.12 It is understood that Fordgate, owners of the existing centre, together with Solihull MBC ae leading a development proposal to redevelop Chelmsley Wood Shopping Centre. Detailed planning consent was granted in January 2004. The proposals are anchored by a new 7,250sqm (78,000sqft) supermarket (believed to be Asda) and a 3,066sqm (33,000sqft) non-food unit, which will be supplemented by the part redevelopment and extension of the existing centre to result in a further 464.5sqm (5,000sqft) of floorspace. The proposals involve the relocation and reprovision of the existing public library and Council offices in the form of a 2,787sqm (30,000sqft) one-stop facility, and the provision of a new 561 space car park. Development is anticipated to commence in the summer of June 2006. This development fits well with wider regeneration proposals for North Solihull which will involve the provision of new housing.

5.13 The development proposals will increase the size of the centre by around 46%, which will consolidate Chelmsley Wood's District Centre role.

Accessibility

Car

5.14 Access to Chelmsley Wood Shopping Centre by car is good, although congestion slows journey times during peak hours. There are 4 car parks in the centre which provide free parking for circa 676 cars, the largest being the multi storey car park opposite Wilkinsons. There is no on-street parking. The provision of car parking (in relation to retail floorspace) is similar to that in Shirley, although significantly lower than Solihull.

Table 5.6 Comparative Parking Provision Ratios (excludes on-street parking)

Location	Gross Retail Floorspace	Centre Parking Spaces	Square Metres of Gross Retail Floorspace per Parking Space
Solihull	80,640sqm	6000	13
Shirley	34,660sqm	900	38.5
Chelmsley Wood	**23,320sqm**	**676**	**34.5**
Knowle	14,210sqm	260	54.7

Source: Experian Goad, 2006

Public Transport

5.15 Chelmsley Wood District Centre is served by a total of 15 bus lines, which operate services to Birmingham City Centre and Solihull Town Centre, as well as orbital routes into the suburbs to the south east of Birmingham, at typical peak time frequencies of 10-30 minutes. Bus stops and waiting facilities are mainly located on Chelmsley Circle and are of reasonable quality, although passenger information is somewhat limited. Routes 96 and 97 (Chelmsley Wood to

Birmingham City Centre) are Bus Showcase routes, which incorporate bus priority measures, high quality waiting facilities and real time information (in parts). This goes some way in improving the efficiency of services through providing clearer passenger information and overcoming congestion problems that severely affect other services in the area.

5.16 There are no rail or Metro services in proximity to the centre.

Bicycle

5.17 Provision for cyclists within Chelmsley Wood District Centre are inadequate. Designated cycle lanes are notably absent from local roads, and cycle parking facilities are not fit-for-purpose.

Pedestrians

5.18 One of the key design characteristics of the centre is vehicular and pedestrian segregation, which has involved the provision of a series of overhead walkways linking the centre to the surrounding residential areas, which provide efficient means of access for those on foot. Alternative access is possible via surface streets, although the limited number of pedestrian crossing points (especially on Chelmsley Circle) make this somewhat hazardous. Once within the shopping centre, pedestrian access is excellent owing to its single level pedestrianised format.

Disabled Access

5.19 The provision of (mainly) wheelchair accessible buses, and allocated disabled parking spaces, aid access to the centre for those with disabilities. However, the fact that the shopping level is elevated (first floor level) creates a physical barrier, which can only be achieved via a series of ramps or the overhead walkways, although is certainly possible.

Conclusions

5.20 The centre has a higher vacancy rate than average and a lower rate of retailer interest, which points to a centre that could be suffering from viability concerns. New development will help address this possible decline.

5.21 The purpose built nature of the centre is tailored to serve the need of shoppers visiting by car and bus. The overhead walkways provide efficient pedestrian access to the centre (although the personal security concerns associated with such routes are well documented), and the internal car-free environment makes it highly accessible once within the centre. In contrast, provision for cyclists and those with disabilities is inadequate.

Perception of Safety and Occurrence of Crime

5.22 Chelmsley Wood district centre lies within the ward of Chelmsley Wood, in which the occurrence of crime is significantly higher than the borough average, as demonstrated in Table 5.7:

Table 5.7 Crime Statistics

	Crime Statistics per 1,000 population		Crime Indices	
	English Average	**Solihull Borough**	**Borough Mean**	**Chelmsley Wood**
Violence against the person	16.5	15	1.0	2.1
Robbery offences	1.4	3	1.0	1.6
Theft of a motor vehicle offences	4.5	4	1.0	2.1
Burglary dwelling offences	6.4	6	1.0	1.5
Theft from a vehicle offences	10	13	1.0	0.9

Source: National Statistics, and West Midlands JDT (2005)

5.23 Chelmsley Wood district centre (and its surroundings) is considered as a crime 'hot spot', with specific regard to the following offences:

- Drug offences (mainly possession);
- High incidence of theft from shops/stores;
- Above average rates of arson; and
- Alcohol related violence around pubs.

5.24 These statistics are consistent with the overall trend of higher crime rates to the north of the borough, and have a negative impact on the centre's vitality and viability.

State of Town Centre Environmental Quality

5.25 Chelmsley Wood district centre offers a poor quality shopping environment. The shopping centre structure is falling into a state of disrepair, is poorly maintained, and is architecturally unattractive. The overwhelming use of grey concrete building materials, use of poor quality surface finishing, limited landscaping and a confusing internal layout contribute further to the centre's unattractiveness. However, the absence of cars from the shopping 'streets' mean that poor air quality and noise pollution associated with motor vehicles is not a problem.

Strengths, Weaknesses, Opportunities, Threats (SWOT) Assessment

5.26 Based on the above analysis, a SWOT assessment has been undertaken in order to summarise the position:

Strengths	Weaknesses
▪ Proportionally high volume of convenience retail floorspace ▪ Caters well for car users ▪ Good bus links ▪ Efficient pedestrian access ▪ Mix of multiple and independent operators	▪ Under-provision of comparison retail and services ▪ Low-value orientated retail offer ▪ Personal safety issues associated with pedestrian access routes ▪ Poor quality shopping environment ▪ Centre is poorly maintained and falling into disrepair ▪ Difficult to police ▪ High vacancy rate
Opportunities	**Threats**
▪ Broaden retail offer to widen catchment market ▪ Aesthetic improvements ▪ Improve provision for cyclists and those with disabilities ▪ Develop evening economy ▪ Improve security ▪ New development proposals proposed by SMBC	▪ Asda development proposals could draw trade from existing independent retailers in Chelmsley Wood ▪ Improvements to other local town centres could draw away demand

Key Messages

- Extensive investment is required to improve the attractiveness and quality of retail premises available in the centre in order to attract greater retailer representation, and subsequently extend the centre's catchment beyond its existing local nature; and

- Attention is required to address issues surrounding anti-social behaviour and crime in the centre.

6 Knowle District Centre

Structure of the Town Centre

6.1 Knowle village centre is considered to be a district centre, owing to the volume and range of its retail offer. It is located within the predominantly rural area of central Solihull Borough and serves a catchment area encompassing Knowle and numerous local villages. The centre lies in the heart of the village and is linear in form, focussed on the High Street. The Town Centre boundary (using the definition set out in Table 2 of PPS6) of the centre is shown in Plan 7.

Primary and Secondary Frontages (the Primary Shopping Area (PSA))

6.2 The primary frontage covers the length of the High Street, while retail premises on Station Road would be considered as being within the secondary frontage. The PSA boundary (using the definition set out in Table 2 of PPS6) of the centre is shown on Plan 8.

Diversity of Main Town Centre Uses

6.3 The volume of retail floorspace within Knowle district centre has remained constant over recent years, the most recent development being an extension to the Tesco store in St Johns Way several years ago. Consequently, floorspace data for 2005 only is provided in Table 6.1 below:

Table 6.1 Retail Composition of Knowle Town Centre

	Units			Gross Floorspace		
	No.	**%**	**GB Ave**	**Floorspace**	**%**	**GB Ave**
Convenience	9	8.5%	9.1%	2,230sqm (24,000sqft)	15.7%	16.7%
Comparison	42	39.6%	47.2%	5,480sqm (59,000sqft)	38.6%	52.7%
Service	48	45.3%	32.2%	5,850sqm (63,000sqft)	41.2%	21.1%
Other	1	0.9%	1.4%	100sqm 1,076sqft	0.7%	1.2%
Vacant	6	5.7%	10.1%	550sqm (5,920sqft)	3.9%	8.2%
Total	106			14,210sqm (153,000sqft)		

6.4 Table 6.1 demonstrates that the centre contains a high proportion of services (hairdressers, restaurants and so forth), while there is a comparatively low proportion of comparison floorspace.

Retailer Representation

Convenience

6.5 The convenience retail offer includes a small Tesco store and a number of independent operators, including a butcher, baker and greengrocer.

Comparison

6.6 None of the key multiple comparison retailers are represented in Knowle. Instead, the comparison retail offer is provided by independent and small scale multiple operators. There are a number of estate agents, hairdressers and travel agents, which create a strong service base for the centre. This is supplemented by several restaurants, pubs and a hotel which create a strong evening economy for a centre of this size.

Proportion of Vacant Street Level Property

6.7 Table 6.1 indicates that there are currently 6 vacant retail units in Knowle district centre, which equates to 550sqm (gross), or 3.9% of total floorspace. This is significantly lower than the national average of 10.1% and is a good indicator of the centre's viability.

Shopping Rents and Commercial Yields

6.8 No retail premises within Knowle centre are currently being actively marketed, and data on historic transactions is limited to that outlined in Table 6.2, below.

Table 6.2 Recent Retail Property Transactions in Knowle

Location	Date of Transaction	Size	Sale Price	Achieved Rent	Rent	Yield
Station Road (corner of High Street)	March 2006	225sqm (2,420sqft)	£475,000 (sought)	£25,000	£10.33/sqft	5.26%

6.9 Owing to the limited data available for Knowle (as a result of very few transactions), it is not possible to provide typical rental values or commercial yields for retail property. However, the yield of 5.26% achieved for the above property could be considered as indicative, and would suggest that the centre represents a relatively low risk and well performing centre from an investment point of view.

Retailer Intention to Change Representation

6.10 One retailer is currently seeking representation in Knowle district centre: Glitz Accessorize is seeking 37-93sqm (400-1,000sqft) . This is significantly below the level of interest for space is centres of comparable status, and suggests limited growth potential for the centre in the immediate future.

The Potential Capacity for Growth or Change of Centres in the Network

6.11 It is understood that there are no significant development proposals or extant planning permissions to increase the existing level of retail floorspace in Knowle. Should demand arise, the surface car parks would offer potential for small scale development. The spaces lost however would have to be replaced given that the car parks are well used at peak times. The centre is not suitable for large scale development, therefore any expansion would be unlikely to change its position in the retail hierarchy.

Accessibility

6.12 Access to Knowle town centre by car is good, although surrounding roads (particularly the A4141) suffer from congestion in peak periods. Free parking is provided in a series of surface car parks that lie to the rear of the High Street, and on-street parking is available to on roads surrounding the High Street (although not on the High Street itself). Table 6.3 below, demonstrates that the centre has a comparatively low amount of parking provision in designated car parks, which can be partly explained by the relatively high availability of on-street parking.

Table 6.3 Comparative Parking Provision Ratios (excludes on-street parking)

Location	Gross Retail Floorspace	Centre Parking Spaces	Square Metres of Gross Retail Floorspace per Parking Space
Solihull	80,640sqm	6000	13
Shirley	34,660sqm	900	38.5
Chelmsley Wood	23,320sqm	676	34.5
Knowle	**14,210sqm**	**260**	**54.7**

Source: Experian Goad 2006

Public Transport

6.13 The centre is served by 6 bus lines which operate along the High Street. These provide links to Solihull, several mid-Warwickshire villages (including Dorridge, Balsall Heath, and Hockley Heath), and Leamington Spa. The most frequent services operate every 30 minutes at peak times, although some are very limited services that do not run to fixed timetables. Given the predominantly rural nature of the centre's catchment, the infrequency of services is understandable, but nevertheless, this makes bus use an unattractive alternative to the car.

6.14 The nearest rail station is at Dorridge, a local centre some 2.3km (1.4miles) from Knowle. This would be an impractical means of access to the centre

Bicycle

6.15 Provision for cyclists within Knowle is inadequate. There are no cycle lanes on the High Street and cycle parking facilities are basic. Consequently, at present, cycling to the centre would not be an attractive alternative means of transport to the car.

Pedestrians

6.16 Pedestrian access in a north south direction is good, and although the busy High Street creates a physical barrier against unrestricted east-west movement, the two pedestrian crossing points adequately resolve conflicts between vehicles and pedestrians.

Disabled Access

6.17 Bus services into the centre are mainly wheelchair accessible, and allocated parking spaces further aid access for those with disabilities. The limited number of east-west streets makes north-south movement straight forward, and the numerous pedestrian crossing points mean that the High Street is not a significant barrier to movement.

Conclusion

6.18 The centre caters adequately for car users (although parking could be improved). However there are few practical or attractive alternative public transport options at present.

Perception of Safety and Occurrence of Crime

6.19 Knowle district centre lies within the ward of Knowle, in which the occurrence of crime is below the borough average, as demonstrated in Table 5.7.

Table 6.7 Crime Statistics

	Crime Statistics per 1,000 population		Crime Indices	
	English Average	**Solihull Borough**	**Borough Mean**	**Knowle**
Violence against the person	16.5	15	1.0	0.3
Robbery offences	1.4	3	1.0	0.2
Theft of a motor vehicle offences	4.5	4	1.0	0.3
Burglary dwelling offences	6.4	6	1.0	0.4
Theft from a vehicle offences	10	13	1.0	0.9

Source: National Statistics, and West Midlands JDT (2005)

6.20 The mixed use nature and layout of the centre all contribute to the perception of safety, which is reflected in the low rates of recorded crime, that contributes to the centre's vitality and viability.

State of Town Centre Environmental Quality

6.21 Knowle district centre is a high quality shopping environment. It contains several buildings of architectural merit, is well maintained, incorporates high quality surface materials and street furniture, and includes high quality shop frontages. Negative elements are largely restricted to air and noise pollution from passing road traffic on High Street.

Strengths, Weaknesses, Opportunities, Threats (SWOT) Assessment

6.22 Based on the above analysis, a SWOT assessment has been undertaken in order to summarise the position:

Strengths	Weaknesses
▪ High quality shopping environment ▪ Strong service offer ▪ Low vacancy rate ▪ Strong independent representation ▪ Strong evening economy	▪ Limited comparison offer ▪ Level of off-street parking ▪ Peak hour congestion ▪ Limited development potential (except on car parks)
Opportunities	**Threats**
▪ Farmers market ▪ Broaden comparison offer	▪ Growth of Solihull offer may weaken position ▪ Increased congestion ▪ Further loss of retail to service/restaurant uses

Key Messages

- Knowle would benefit from limited further development in order to sustain its existing role and address likely future competition from competing centres.

7 Out of Centre Retail Provision in Solihull Borough

Introduction

7.1 Like many other settlements throughout the UK, retail provision in Solihull's town and district centres is supplemented by provision in a number of small local centres and out of centre developments. The purpose of this section is to provide an overview of the scope and scale of this out-of-centre provision within the Borough.

Local Centres

7.2 It is not within the remit of this healthcheck study to examine in detail the retail use and composition of the Borough's local centres, although, in general, it is useful to note that the role of these centres is to serve the immediate catchment around each location. In most cases retail provision in small centres is limited to a small collection of independent convenience, comparison and service units, although some centres do benefit from national multiple representation (for example small supermarkets/convenience stores).

Out-of-Centre Provision

Current Provision

7.3 Out-of-centre provision in Solihull is dominated by a series of retail parks offering a mix of comparison and convenience retailing. The largest retail parks are as follows:

- Sears Retail Park – Opened in 1993 and located in Shirley. Offers circa 17,645sqm (188,000sqft) of predominantly comparison retail floorspace. Anchored by Habitat and Comet; and
- Solihull Retail Park – opened in 1999 and located in Shirley. Offers circa 17,370sqm (187,000sqft) of predominantly comparison retailing, anchored by MFI and Currys;

7.4 In addition, there are out-of-centre supermarkets, including representation from Tesco and Sainsburys, and a freestanding fast-food outlets such as McDonalds.

7.5 A questionnaire survey undertaken in 2004 to support a planning application for a 'bulky goods' retail development at Haden Way in Birmingham (on the Middle Ring Road) showed that a significant amount of bulky goods expenditure from the Central and South area of Birmingham was leaking to the Solihull retail parks, such that they were significantly over trading. Permission has been granted for the Haden Way development (22,015sqm (237,000sqft)) and when that comes on stream in 2009, should lead to a reduction in the performance of the Solihull retail parks.

Retailer Demand and Future Development

7.6 Table 7.1 below, outlines levels of retailer demand for out-of-centre floorspace within Solihull Borough, and establishes the level of current demand for space in competitive locations for comparison purposes. Retailer requirements of note include Aldi, Staples and Fabric Warehouse, which are supplemented by food and drink operators such as Pizza Hut.

Table 7.1 Retailer Requirements in Solihull and Comparable Centres (out-of-centre only)

	Location	Total (no.)	Total (sqft) (minimum)
Higher Order Centres	Solihull	8	4,300sqm (46,289sqft)
	Coventry	26	78,600sqm (846,389sqft)
	Leamington Spa	19	16,770sqm (180,489sqft)
	Sutton Coldfield	9	4,515sqm (48,600sqft)
Lower Order Centres	Shirley	2	474sqm (5,100sqft)
	Chelmsley Wood	1	1,356sqm (14,600sqft)
	Kenilworth	2	1,820sqm (19,600sqft)
	Acocks Green	2	114sqm (4,800sqft)
	Kings Heath	2	836sqm (9,000sqft)

Source: Valuation Office, 2006

7.7 As is demonstrated in Table 7.1, retailer requirements for space in Solihull is significantly lower than other local areas, most notably Coventry where retailers have expressed interest in locating a number of very large warehouse style retail units. This suggests that, when compared to other areas, there is a reasonably sufficient supply of out-of-centre floorspace.

7.8 In terms of the development pipeline, it is understood that there is an extant outline planning consent for the redevelopment of the Evans Halshaw complex on Marshall Lake Road (Shirley) for 3 non-food retail units. In addition, a planning application for a new B+Q store has been refused and appealed.

8 Implications for the Emerging Town Centre Strategy and Strategies for other Centres

8.1 The following points incorporate a series of key messages that have emerged from the health check analyses and effectively summarise the current position.

- Solihull town centre performs well against key viability and vitality indicators, is commercially attractive from an investor point of view, and is a centre of significant importance for comparison goods (being particularly well represented by high-quality operators). There is developer interest and consumer demand for further retail space in the town (as well as improvements to existing premises), and as part of any strategy there will be a need to consider the extent of the core shopping area boundary in order to accommodate future development;

- Shirley district centre offers an extensive convenience retail range, with a limited representation of comparison retailers. The Shirley Advance proposals will help arrest any further decline of the centre, although are unlikely to change its role and position in the retail hierarchy;

- Chelmsley Wood district centre contains a mix of low-value comparison and convenience retailers, offers a poor quality retail environment, and performs poorly against key vitality and viability indicators. Consequently, there is an urgent need for investment to increase the centre's attractiveness, beyond the immediate convenience market, in order to attract further spending. The North Solihull Regeneration Initiative will provide a vehicle for such improvements;

- Knowle serves a highly affluent population and plays an important role for local convenience and comparison retailing and is an important local service centre. It offers a high quality environment. It would benefit from limited expansion (there is space available on the centre's surface car parks), although it is unlikely that this would lead to a change in its role in the retail hierarchy, but rather enable it to compete more effectively with other centres;

- There are opportunities to develop the evening economy of Solihull town centre by diversifying uses to include more high quality restaurant/leisure uses (A3 uses). Such proposals could add to the potential attractiveness of Solihull as a location for new high density 'City-Living' style apartments; and

- Solihull suffers from congestion at peak times and this reflects the fact that most consumers arrive by private car. There are opportunities to increase the public transport as part of a strategy to reduce car journeys to the centre. At present Solihull railway station/ bus interchange are remote from the town centre exacerbating this problem. This points to a need to consider alternative solutions to provide rail and bus access. There is a similar need to improve modal shift in the other local town/ district centres, although this is more difficult given their greater focus upon convenience shopping. (Modal shift is considered further in Direction Paper 5).

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