STAFFORD BOROUGH COUNCIL

STAFFORD TOWN CENTRE STUDY

FINAL REPORT

MARCH 2000

Chesterton

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CONTENTS

Technical Appendices and Executive Summary bound under separate cover.
and Executive Summary

EXECUTIVE SUMMARY

1. Scope of the Study

Chesterton were commissioned by Stafford Borough Council in September 1999, to undertake a retail and economic study of Stafford Town Centre providing a detailed evaluation of how the centre can evolve through to 2020.

The aim of the study was to prepare a long term (20 year) strategy which will help ensure that Stafford Town Centre can fulfil its overall potential as well as responding to increased competition from other centres. The overall strategy will seek to maintain and enhance the town's current position as a location for retail, leisure, employment and residential activity.

2. The Shopping Hierarchy

Major sub-regional centres such as Hanley, Wolverhampton and to some extent Telford, heavily influence the current shopping hierarchy, within which Stafford Town Centre operates. In addition, major regional centres such as Birmingham and Manchester do have some effect on current shopping patterns within Stafford's hierarchy. However, problems relating to accessibility along the M6, especially to Birmingham, tend to limit their overall impact.

Stafford Town Centre does not offer the same scale and range of retail facilities provided within Hanley, Wolverhampton or Birmingham. Therefore, there is a general perception that Stafford does not compete as effectively as it should given its current size. Clearly, the strength of competing centres has constrained the catchment area and market share of Stafford. Nevertheless, the household and shopper survey both demonstrate that Stafford is an important destination for both food and non-food shopping as well as leisure and entertainment facilities, particularly for residents within the Borough.

3. Stafford's Current Competitive Position

It is evident from Hillier Parker's Town Centre Ranking Report, that the number of multiple retailers within Stafford has remained relatively static between 1984 and 1995 despite the introduction of the Guildhall Centre in the early 1990's. This would suggest that there is a fairly consistent pattern of demand for multiple retailers within Stafford and it is unlikely that significant provision of additional floorspace could potentially 'buck' these market conditions and cause a significant increase in Stafford's ranking and hierarchical position. However, whilst Stafford has remained fairly stable, Wolverhampton has suffered considerably, losing 36 places for a centre which used to be ranked 16 out of 1,396.

In addition to Hillier Parker's report, Experian Goad also provide a national ranking system based on a town centre vitality score. Nationally, Stafford is ranked 105th out of the 554 centres examined by GOAD. This places Stafford in the top fifth of all of the UK's important retail centres which underlines its true trading strength in relation to its limited catchment and overall size. In terms of the West Midlands Region, Stafford is ranked 15th out of 49, falling within the top 30% of all centres.

Centre	1998 Vitality Score	National Rank	West Midlands Rank
Stafford	150	105	15
Wolverhampton	185	51	6
Hanley	192	44	5
Telford	146	117	16
Tamworth	163	121	20
Cannock	98	227	31
Burton-upon-Trent	153	98	13

Source: Experian GOAD 1999

What is important to note is that both the Hillier Parker and Experian GOAD rankings place Stafford within the top 10% and 19% nationally. This clearly refutes perceptions that Stafford is a weak centre, which is currently under performing in relation to its catchment and direct competitors. There are areas for improvement, but these can only seek to improve on a position of strength, which already manifests itself within the town.

4. Stafford Town Centre Appraisal

The town centre serves as a focus for retail, commercial and leisure facilities for the population of the town itself and surrounding areas including Eccleshall and Stone. As a county and university town, Stafford town centre is able to sustain a good diversity of uses to complement the retail function.

The town centre has a total of 63,840 sq m floorspace in 292 units. It has a strong representation of convenience goods floorspace with both Tesco and Sainsbury stores within Goad's defined town centre. Comparison goods floorspace is slightly above the national average confirming Stafford's role as a non-food retail centre for the town and its surrounding area. Conversely, representation of service trades is lower than nationally, both in terms of floorspace and number of units.

Trade Mix	% Gross Floorspace		% No of Units	
	Stafford	GB	Stafford	GB
Food/convenience	19.2	14.3	9.3	9.6
Comparison	55.0	53.7	57.2	49.5
Service	17.1	20.2	23.6	27.0
Vacant	7.8	10.1	9.3	12.6
Miscellaneous	0.8	1.7	0.7	1.3

Source: Goad, 1999

Vacancy rates are low at 9.3% of the total number of units, compared with the national average of 12.6%.

Vacant Units							
Jan 1992		June 1995		Feb 1999		Dec 1999	
No	%	No	%	No	%	No	%
38	13.8	40	14.7	27	9.3	27	9.6

National average (Feb 1999): 12.6%
Source: Goad surveys & Chesterton (Dec. 1999)

Stafford town centre currently has a very good representation of high street multiples with 149 multiple retailers represented and a good range of other high street names. Stafford also has the advantage of having a good variety of independent traders.

Centre	No of Multiple Outlets	%
Cannock	82	48.2%
Stafford	149	51.0%
Stoke-on-Trent Central	37	21.4%
Stoke on Trent Hanley	223	43.2%
Telford	118	80.8%
Wolverhampton	267	37.9%
GB average		34.1%

Source: Goad, Retail Centre Ranking, 1998

In terms of accessibility by public transport, the railway station is relatively well located on the edge of the town centre and the town centre is reasonably well served by bus services.

Car parks are convenient and well distributed around the town centre with a mix of long and short stay parking available. In broad terms, levels of parking in Stafford Town Centre are comparable with levels in Cannock and Wolverhampton and compare favourably with Stoke-on-Trent and Hanley. Telford Town Centre has an abnormally high car parking to floorspace ratio which is due in part to the centre being purpose built as a New Town and also because of the high office content in the town centre which is recorded on the Goad map.

Centre	Total Floorspace - sqm	No of Public Parking Spaces	Parking to Floorspace Ratio
Cannock	39,950	1,600	1 : 25
Stafford	63,840	2,200	1 : 29
Stoke-on-Trent	28,630	560	1 : 51
Hanley	114,010	3,100	1 : 37
Telford	53,900	6,800	1 : 08
Wolverhampton	135,930	5,200	1 : 26

Source : GOAD 1999

Stafford Town Centre contains a mix of modern and traditional older buildings with some extremely attractive frontages and some outstanding historic buildings. The town centre has been attractively pedestrianised, enhancing the townscape quality and providing a safe and pleasant environment for shoppers and other visitors to the town centre.

Future action should be aimed at securing environmental improvements to the peripheral areas of the town centre, particularly the Bridge Street area, together with enhancing the riverside walk and improving pedestrian links to the railway station. It will be important for the centre's continuing vitality and viability that any loss of public car parking, for example through redevelopment schemes, should be replaced in convenient locations.

5. Market Research

A key element of this study was to obtain a detailed understanding of Stafford's potential catchment and the shopping patterns that currently exist within it. This was achieved by three strands of original market research as follows:

- **A Household Telephone Survey** - which interviewed 750 households throughout the defined catchment;

- **A Town Centre Shopper Survey** - which interviewed 289 shoppers in Stafford Town Centre spread over three days (Thursday, Friday and Saturday); and

- **A Postal Occupier Survey** - which was delivered to 150 businesses who are currently active within the Town Centre.

Summaries of the results are highlighted within the main report with detailed results provided in the technical appendices.

6. Stafford Town Centre's Catchment

From their knowledge of competing centres and the likely sphere of influence of the retail facilities currently found within Stafford Town Centre, Chesterton believe that Stafford is likely to attract the majority of its shoppers from within 15 to 20 minutes off-peak drive time of the Town Centre.

However, with no historical data available in relation to Stafford's potential catchment, Chesterton have purposely 'stretched' the boundary of the Household Survey to cover certain areas outside the primary catchment where there is still uncertainty as to where people within these areas currently shop. These areas are mainly concentrated to the east and west including Rugeley and Uttoxeter and Newport.

The defined catchment adopted has been broken down into postal code zones at a four-digit level (see map). This zoning by post code has enabled us to build up a 'jigsaw' of the different shopping patterns that occur within each post code zone and how this impacts on Stafford's overall market share. Clearly, the primary catchment for Stafford is focused upon postal code zones including ST16, 17 and 18 with the remaining zones looking to various centres including Stafford.

The 1991 Census of Population estimates that there are currently over 234,200 people within the defined catchment for this study. Using Staffordshire County Council population projections, it is anticipated that by 2011, the catchment will have grown by 2.6% to over 240,200.

7. Retail Expenditure - Spending Potential within the Catchment

Unit for Retail Planning (URPI) expenditure growth rates have been applied to Chesterton's population projection model, which has been based on the County Council population forecasts outlined above. Using this model Chesterton have produced expenditure estimates for the potential catchment area for 1998, 2001, 2006 and 2011 which take into account both retail expenditure growth and population growth.

	1999	2001	2006	2011
Convenience - food	£273.1m	£275.4m	£297.8m	£283.9m
Comparison - non food	£372.4m	£401.5m	£484.1m	£583.9m

Source : Chesterton, 1999

It can be seen from the above table that forecast future growth in retail expenditure will be dominated by spending on non-food goods with only modest increases forecast on food grocery spending.

8. Stafford's Current Market Share

By analysing the results from the survey it has been possible to understand the likely levels of expenditure that flow into Stafford Town Centre.

It is evident from the survey results, that Stafford's primary catchment is concentrated within the postal code zones of ST16 to 18. The strength of Uttoxeter's provision ensures that very little expenditure from within ST14 comes to Stafford Town Centre. This compares to the zones to the north and south (ST19 and ST15) where Stafford currently draws almost a third of the expenditure from each.

However, despite the proximity of competing centres to Stafford it is interesting to note that the town is a popular destination for non-food shopping as it is for convenience goods. Usually the market shares for comparison goods tend to be lower as people are prepared to travel greater distances when shopping for non-food goods. As highlighted previously, this would underline the strength of Stafford as a comparison goods centre within its immediate catchment.

	Market Share	**Expenditure Available to Stafford Town Centre - £M**			
		1999	**2001**	**2006**	**2011**
Convenience					
Main	39%	78.4	79.1	80.3	81.5
Top up	11%	8.2	8.3	8.4	8.5
All Convenience	*32%*	*86.6*	*87.4*	*88.7*	*90.0*
Inflow	5%	4.3	4.4	4.4	4.5
Total Convenience		**90.9**	**91.8**	**93.1**	**94.5**
Comparison	38%	142.9	154.0	185.8	224.0
5% Inflow		7.2	7.7	9.3	11.2
Total Comparison		**150.1**	**161.7**	**195.1**	**235.2**

Source : Chesterton Household Survey, 1999

With forecast growth in convenience shopping predicted at only 0.1% per annum it is not surprising to discover that Stafford Town Centre will only experience an increase of £3.6m in food expenditure between 1999 and 2011. In comparison, the significant increase in expenditure on non-food goods would suggest that Stafford's 38% market share would see an increase of over £85m, which would be available for new retail facilities in the future.

9. Future Need for Convenience Goods Floorspace

Chesterton's analysis of Stafford Town Centre's market share of convenience goods expenditure within the defined catchment indicates that in 1999 approximately £90.9m is estimated to be available to convenience goods stores within Stafford Town Centre. When Chesterton compare this estimate with the total turnover generated by existing retail facilities based on company averages, it can be seen that the current provision is broadly in balance with a difference of +£1.9m.

As it is unlikely that Stafford will significantly increase its market share for food sales in the future (especially in relation to proposed increases in supply at Rugeley, Cannock and Hednesford), it is evident that there will be limited demand for new convenience goods floorspace throughout the next plan period.

In addition, the proposed development of the Lidl foodstore at the former Stafford General Infirmary is likely to absorb a significant proportion of the projected growth through the next plan period.

10. Future Need for Comparison Goods Floorspace

As our general standard of living increases our ability to spend more money on non-food goods such as clothing and footwear will also increase. The current ultra-long term growth rate provided by URPI suggests that this growth is likely to be 3.6% per annum. Clearly, over any 10 year plan period this represents a significant increase in total non-food expenditure.

Bulky Goods - Retail Warehouses

Based on their evaluation of the likely turnover of Stafford's current retail warehouse provision, Chesterton estimate that this currently represents 24% of Stafford's total non-food expenditure (i.e. 35.87/150.1x100=23.9).

Therefore, when Chesterton role forward this 24% share (or £35.9m) and allow for increased productivity and special forms of trading, the likely expenditure available for retail warehousing floorspace will be as follows.

	Surplus Expenditure - £M	Average Sales Density + Increases in productivity	Net floorspace Requirement - sqm	Gross Floorspace Requirement
1999	-	1,750	-	-
2001	2.09	1,785	1,170	1,380
2006	7.88	1,875	4,200	4,940
2011	15.82	1,970	8,030	9,450

Source: Chesterton 1999 at 1995 Prices

By applying an average sales density for retail warehousing to the surplus expenditure, Chesterton estimate that by the year 2011 there will be a requirement for approximately 9,450 sqm gross at the current market share.

In terms of future supply, Chesterton are aware that an additional retail warehouse scheme is currently being developed at the now redundant Stafford General Infirmary which will involve the construction of 8,300 sqm gross of retail warehousing potentially split into six units plus a Lidl foodstore. By comparing the size of this scheme with the likely growth that will be achieved in bulky goods expenditure in Stafford, it appears that this scheme (when fully operational) will absorb the majority of the surplus capacity available through to 2011.

Town Centre Comparison Floorspace

From Chesterton's analysis of the market share of Stafford Town Centre, Chesterton estimate that the current level of trade passing through town centre non-food facilities (which excludes retail warehousing outlined above) is £114.2m. This includes 5% inflow from outside the defined catchment, based on the town centre survey analysis.

From the modelling outlined in the previous section, Chesterton have forecast that between 1999 and 2011, an additional £85.1m will be available for non-food shopping. Clearly, if no additional comparison goods floorspace was developed within the period up to 2011 then, regardless of improved productivity by existing facilities, the majority of this surplus could be lost to competing centres.

By allowing for both increased productivity and the emerging growth in 'E-tailing' Chesterton have estimated below the likely expenditure that will be available for new comparison goods floorspace by 2011.

	Surplus Expenditure - £M	Average Sales Density + Increases in productivity	Net floorspace Requirement - sqm	Gross Floorspace Requirement
1999	-	4,645	-	-
2001	6.08	4,740	1,280	1,700
2006	24.60	4,980	4,940	6,580
2011	47.59	5,235	9,090	12,090

By applying an average sales density for town centre retail facilities to the surplus expenditure, Chesterton estimate that by the year 2011 there will be a requirement for approximately 12,000 sqm gross to retain its current market share.

However, it must be clear that any strengthening of Stafford's future role and provision must be done on a sensitive and incremental basis which will enable the town to maintain and possibly enhance its current status without damaging existing multiple, or more importantly, indigenous independent retailers. Any future strategy, which will enable Stafford to continue to operate effectively over the next 20 years, must seek to avoid significant influxes of retail floorspace which are insensitive to the finely balanced supply and demand scenario that currently exists within the town.

What is also critical is the fact that the potential capacity identified above can be accommodated and absorbed within the existing town centre boundary. Over the longer term it may be necessary to begin to break through into areas beyond the current town centre and examine ways of overcoming the restrictive nature of the Queensway. However, for the short to medium term, the focus for new comparison goods retail provision must be primarily targeted within the existing town centre.

11. Responding to Future Trends

In the longer term, demand for commercial premises may be influenced by unforeseen changes. As a result it will be necessary to monitor emerging trends. The overall strategy for Stafford should be flexible, but realistic, and should have the ability to respond to these changes.

In the past demand for retail and leisure facilities has grown steadily (in terms of both consumer and occupier demand). If this trend continues in the future there may be scope for expansion of facilities, certainly in the long term. If the Council wish to ensure that Stafford can respond to any long-term growth it will be necessary to plan for this growth now.

In addition to these trends, the retail and service sector is constantly changing, with new operators entering the market. The leisure and entertainment sector has also experienced some rapid changes. These changes can be difficult to predict, but it is possible to provide the required level of flexibility to ensure that emerging opportunities are not missed.

The emerging recommendations for Stafford will need to bear in mind future uncertainties and risks, and should be in a position to respond to opportunities that arise.

12. Key Player Feedback

To inform the study, discussions were undertaken with a number of key players including retailers, commercial agents, investors, council officers and other interested parties. Views were ascertained on the buoyancy of the commercial property market in Stafford Town Centre and its attractiveness to potential investors. General opinions were also sought on the strengths and weaknesses of the town and any suggestions for improvements.

Key messages from this consultation underlined Chesterton's initial assumptions that:

- Stafford has a strong mix of independent and multiple retailers;
- More could be achieved through promotion of the town's image, particularly to attract more visitors to the town;
- Consideration should be given to relocating the market to market square to help improve the presence of the market and overcome the current 'sterile' nature of the square;
- Efforts should be made to stimulate the evening economy and attract more wine bars and restaurants;
- Access and car parking must be seen a key priority in the future; and
- More regular dialogue between traders and council members/officers was felt to be particularly important.

13. SWOT Analysis

In order to arrive at a realistic and deliverable strategy, it is important to ensure that it is based on a thorough understanding of the town centre's current and future opportunities and limitations.

Therefore, the first and most important stage of the development of the strategy involves identifying the true strengths and weaknesses of the town centre and consequently, priorities for action.

Chesterton's broad overview of the Stafford's Town Centre's opportunities and limitations are provided in the form of a SWOT analysis.

STRENGTHS	WEAKNESSES
• Below average vacancy rates • Stable trading position • Good range of multiples given catchment size and profile • Limited but loyal catchment • Strong independent retail sector • Attractive historic townscape • Availability of car parking • Key anchor foodstores • Public transport links • Cinema and leisure facilities • Security and cleanliness • Town centre management structure	• Perceived lack of key retailers and major stores • Current image and external perception • Limited number of quality café bars/restaurants • Limited sites for redevelopment • Limited national profile • Poor links with traders/consultation • Limited training support for indigenous businesses • 'Severing' effect of South Walls/Mill Bank • Limited investment targeted at Southern end of the Town • Limited profile of indoor market • Limited contribution to town centre economy by tourists and office employees
OPPORTUNITIES	**THREATS**
• Secure additional floorspace through innovative redevelopment schemes • Improve investment in the southern sector of the town focusing on leisure uses • Enhancement of the evening economy • Build on tourism potential • Improve external image • Increase number of visitors from outside the primary catchment • Creation of a more effective and vibrant market/market place	• Competition from centres such as Hanley, Telford and Cannock • Ineffective implementation of a future tourist strategy • Inability to assemble future town centre sites • Further pressure for out-of-centre development • Loss of independent retailers • Shopping by mail order, telephone or computer • Traffic Congestion

14. Areas of Opportunity

This study has highlighted a number of opportunities that may meet the Council's objectives for the future prosperity and development of the town centre. These opportunities range from site-specific improvement areas through to promotional and town centre management activities. The key areas of opportunity identified are highlighted below:

- The Sheridan Centre
- Chell Road/Broad Street Area
- St John's Market Hall and Market Square
- Land Off Tipping Street
- Riverside/Bridge Street
- Friar's Walk
- Land Off Newport Road

From Chesterton's assessment of each of these opportunities, they believe that there is considerable scope for the provision of additional retail, leisure and residential facilities within the current town centre boundary.

15. Recommended Strategic Approach

The process of town centre revitalisation is complex, requiring action on a number of fronts in a co-ordinated and timely fashion. From their analysis, Chesterton can confirm that Stafford does not currently suffer from the 'deep rooted' economic limitations, which are affecting other less fortunate town centres throughout the UK.

However, there are a number of key issues that have arisen during the study that will influence the future strategic direction to be adopted.

Any improvements and development proposals in Stafford Town Centre will need to be considered against the Council's long-term aspirations for the centre. Proposals will also need to be viewed against emerging national and local trends and the risks associated with projecting these trends. There are three broad approaches that could be adopted by the Council, as summarised below.

- **Do nothing** – the Council could leave the future development and promotion of Stafford Town Centre to the market. Therefore, it would be left to the property market to respond to future changes. The delivery of this approach has the lowest level of financial commitment, but may lead to a decline in Stafford's role and status within the regional/local hierarchy.

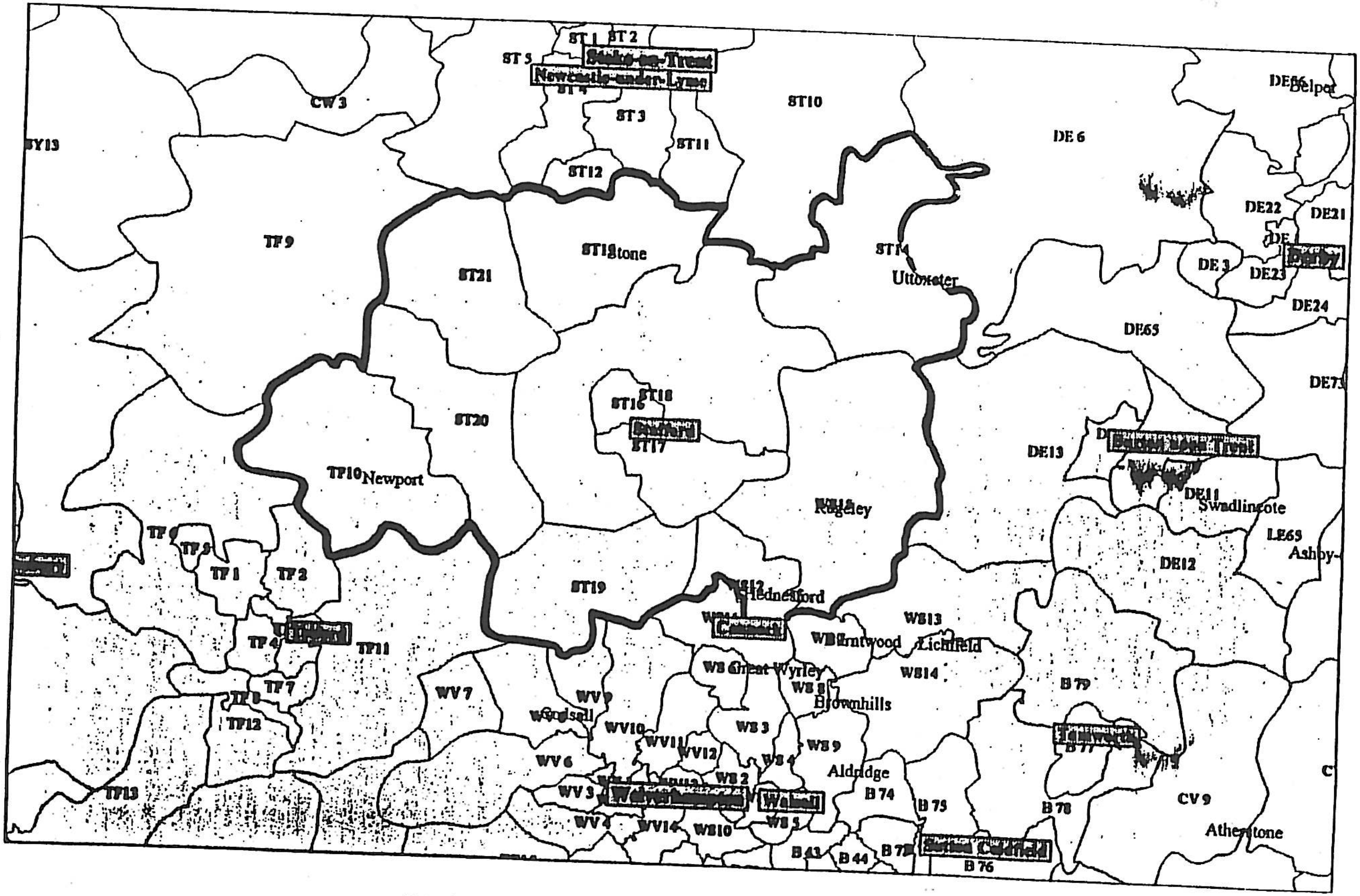
- **Maintenance of its current status** – Stafford would be maintained and improved modestly to ensure that it retains its current role within the hierarchy. The aim will be to build on the centre's current strengths rather than radical change.

- **Expand and change its status** – Stafford would be expanded and improved in order to try and enhance the centre's position within the hierarchy.

If the Council adopt the *do nothing* approach then there is a danger that Stafford will experience a gradual decline in its role in relation to its competitors. The short-term options (during the next five years) to significantly expand and change Stafford's role and status are limited. However, in the longer-term (5-20 years) there may be redevelopment opportunities capable of expanding Stafford's role as a commercial centre. Therefore the strategic approach recommended by Chesterton is as follows:

- up to five years (maintain status) – gradual improvements to Stafford's offer in order to respond to increasing competition and consumer demand whilst continuing to develop the opportunities for the longer term;

- longer-term (enhance status) – implementation of redevelopment opportunities to expand and diversify Stafford Town Centre.



Stafford and surrounding area - Postcode districts

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1 INTRODUCTION

1.1 Objectives

Chesterton were commissioned by Stafford Borough Council in September 1999, to undertake a retail and economic study of Stafford Town Centre providing a detailed evaluation of how the centre can evolve through to 2020.

The aim of this study is to prepare a long term (20 year) strategy which will help ensure that Stafford Town Centre can fulfil its overall potential as well as responding to increased competition from other centres. The overall strategy will seek to maintain and enhance the town's current position as a location for retail, leisure, employment and residential activity.

In particular, the study seeks to:

- assess Stafford's competitive position within the local and regional hierarchy and how it performs in relation to similar towns throughout the UK;

- provide an assessment of Stafford's potential catchment population and current levels of leakage;

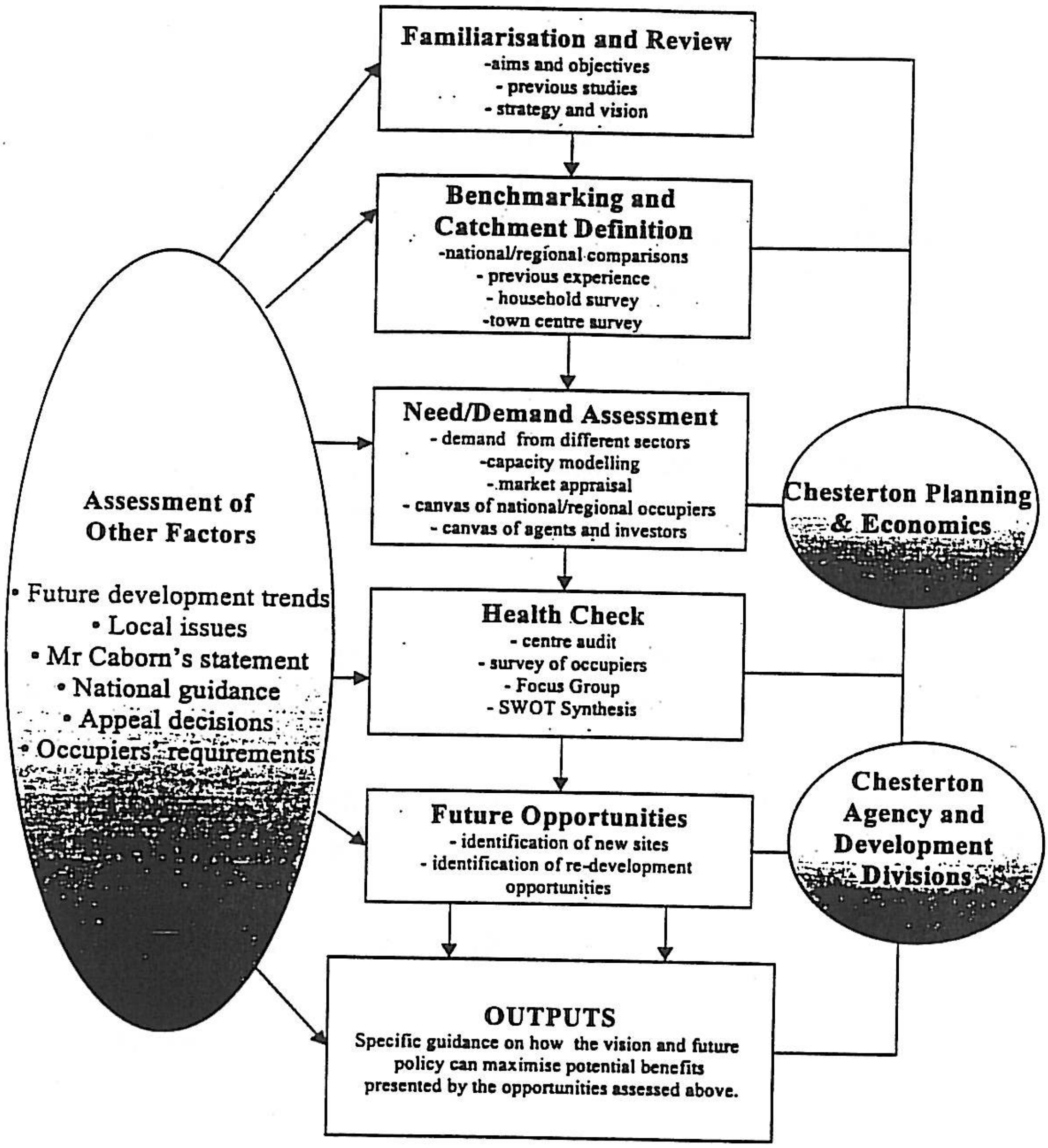
- Undertake an assessment of the likely growth in expenditure and the need for additional retail and leisure and service/B1 office facilities;

- Undertake a 'Health Check' of Stafford Town Centre; and

- Examine future development opportunities to accommodate the predicted growth identified in the above objectives.

1.2 Study Methodology

A detailed appraisal of Stafford Town Centre has been undertaken in order to assess (in qualitative terms) the scope for improvement. Consideration has been given to specific opportunities within the town centre and wider market trends. This assessment has examined the strengths and weaknesses of the town centre in terms of the current mix of shops, services and other land uses, and the identification of any gaps in provision. The analysis has included a brief assessment of the suitability of potential development sites, premises and vacant buildings to meet the potential requirements of occupiers, investors and developers.



We have used a variety of data sources in undertaking this study including Goad data on shopping floorspace, Investment Property Database for information on rents and yields and the Focus database for information on rents and retailers' requirements. We have also taken advice from our in-house commercial team both on the commercial health of the town centre generally and on the opportunities to secure development on identified sites.

In order to obtain information on the extent of Stafford's catchment and shopping patterns, we commissioned a specialist market research agency, Research and Marketing Ltd, to undertake a telephone household survey of residents. A street interview survey in Stafford Town Centre was also undertaken to obtain further information on shopping habits and to seek people's views on the town centre.

In addition, we undertook a postal survey of 150 businesses throughout the town centre as well as inviting retailers and other interested parties to attend a focus group discussion that explored Stafford's current strengths and weaknesses.

2 BACKGROUND

2.1 The Shopping Hierarchy

A shopping hierarchy ranks shopping centres in accordance with a variety of criteria that include retail turnover, floorspace, catchment population, sphere of influence and the number of multiples. By understanding the role, which Stafford can realistically fulfil within the existing hierarchy, it is possible to understand how the centre can develop and where additional pressures from future competition will come from.

Major sub-regional centres such as Hanley, Wolverhampton and to some extent Telford, heavily influence the current shopping hierarchy, within which Stafford Town Centre operates. In addition, major regional centres such as Birmingham and Manchester do have some effect of current shopping patterns within Stafford's hierarchy. However, problems relating to accessibility along the M6, especially to Birmingham, tend to limit their overall impact.

Within higher order centres a greater emphasis is placed on non-food shopping (comparison goods) whilst lower order centres, such as district and local centres, are mostly visited for their food shopping.

Major comparison (non-food) centres are frequently referred to as regional and sub-regional centres because they draw their trade from wider/larger catchment areas. Clearly, the strength of competition from regional and sub-regional centres will have a significant impact of the levels of retail trade that can be secured within Stafford Town Centre. This especially relates to high street multiple operators, who tend to concentrate their operations within higher order centres to take full advantage of the wider benefits of a large catchment population.

Stafford Town Centre does not offer the same scale and range of retail facilities provided within Hanley, Wolverhampton or Birmingham. Therefore, there is a general perception that Stafford does not compete as effectively as it should given its current size. Clearly, the strength of competing centres has constrained the catchment area and market share of Stafford. Nevertheless, our household and shopper survey both demonstrate that Stafford is an important destination for both food and non-food shopping as well as leisure and entertainment facilities, particularly for residents within the Borough.

2.2 Stafford's Current Competitive Position

The mix and quality of retail facilities is also an important factor when comparing the relative strengths of competing centres. Although a detailed analysis of Stafford's current offer and competitive position is examined in Section 4, we feel it is also important to address current perceptions in relation to published sources which seek to rank centres.

Hillier Parker's Retailer Representation

The most widely used source is Hillier Parker's Town Centre Ranking Report, which monitors a town centre's performance purely based on multiple retail operators (i.e well known high street names).

The document contains the results of a national survey of non-food multiple representation by trading location. The current study (1996) forms part of a major programme of research, designed to identify the relative standing of trading locations, that was originally initiated by Hillier Parker in conjunction with the University of Newcastle in 1984.

A total of 324 multiple fascias, with chain networks incorporating 18,833 branches, were adopted for screening purposes in the current study. Counts were undertaken in 1,396 separate trading locations nationally.

The latest version (1996) provides counts and rankings for 1995. Although this data is now somewhat dated, it still provides interesting historical data relating to the overall inflow and outflow of high street multiple retailers. The table below provides a comparison of the 1995 position for both Stafford and its competing centres.

Centre	Multiple Count	1995 Rank	1984 Rank	Rank Change 1984-1995
Stafford	42	139	137	-2
Hanley	72	52	39	-13
Wolverhampton	72	52	16	-36
Telford	49	106	177	+71
Stone	5	572	724	+152
Tamworth	24	215	204	-11

Source : Hillier Parker 1996

It is evident from the information above that the number of multiple retailers within Stafford has remained relatively static between 1984 and 1995 despite the introduction of the Guildhall Centre in the early 1990's. This would suggest that there is a fairly consistent pattern of demand for multiple retailers within Stafford and it is unlikely that significant provision of additional floorspace could potentially 'buck' these market conditions and cause a significant increase in Stafford's ranking and hierarchical position.

What is important however, is that Stafford is currently ranked within the top 10% of the 1,396 centres surveyed in 1995. This not only underlines the high level of national multiples per unit count which is evident within Stafford, but also highlights the true trading strength of the Town as a whole.

While Stafford has remained fairly stable Wolverhampton has suffered considerably losing 36 places for a centre which used to be ranked 16 out of 1,396. In comparison, Telford has managed to improve its raking by 71 places through significant development and expansion which has provided a significant number of modern flexible units appealing to high street multiple retailers. A similar scenario has occurred in Hanley although this is not reflected in the 1995 survey, which shows a slight decline in Hanley's ranking.

Retail Centre Ranking – Experian Goad

From past experience, we have examined a number of town centres that have a limited national multiple retailer base mainly due to the proximity of competing centres. Therefore, their competitive position within the Hillier Parker report would always be limited despite the fact that that particular centre may have a strong independent retail offer. Therefore, we have also examined another published source which is compiled by Experian Goad.

Experian's Retail Centre Ranking is the first ranking to use empirical, rather than modelled data to assess the strength of retail centres by bringing together a number of factors that are widely regarded as being indicative of retail strength. It recognises the importance of multiple presence, but also takes into account other factors including:

- The size of the centre
- Number of outlets
- Retail density
- The level of vacancies, and
- The presence of key high street retailers

The combination of all of these factors generates a vitality score for each centre that is regarded as a measure of retail strength. These scores are then used to rank each centre.

Centre	1998 Vitality Score	National Rank	West Midlands Rank
Stafford	150	105	15
Wolverhampton	185	51	6
Hanley	192	44	5
Telford	146	117	16
Tamworth	163	121	20
Cannock	98	227	31
Burton-upon-Trent	153	98	13

Source: Experian GOAD 1999

Nationally, Stafford is ranked 105th out of the 554 centres examined by GOAD. This places Stafford in the top fifth of all of the UK's important retail centres which underlines its true trading strength in relation to its limited catchment and overall size. Nationally, Stafford is currently ranked close to centres such as Dundee, Carlisle, Nuneaton and Woking. In terms of the West Midlands Region, Stafford is ranked 15th out of 49 falling within the top 30% of all centres.

As previously highlighted, these national ranking documents must only be viewed as providing a useful 'snap shot' of a town/cities current competitive position rather than representing a definitive qualification of the current strength of a particular centre. Clearly, all centres are unique and various factors that may effectively contribute to vitality and viability, are often not captured within standardised survey works such as those highlighted above.

However, what is important is that the Hillier Parker and Experian GOAD rankings place Stafford within the top 10% and 19% nationally. This clearly refutes perceptions that Stafford is a weak centre, which is currently under-performing in relation to its catchment and direct competitors. Clearly, there are areas for improvement which will be examined later within the report but these can only seek to improve on a position of strength which already manifests itself within the town.

2.3 The Existing Town Centre Strategy

Stafford Borough Council's current strategy and objectives for the town centre are set out in the following documents:

- The Stafford Borough Local Plan –Adopted 20th October 1998
- A Strategy to Take Stafford into the New Millennium – April 1997
- The Town Centre Business Plan –1999

2.4 The Stafford Borough Local Plan

The Borough Local Plan contains policies relating to Stafford Town Centre. These policies seek to enhance the vitality and viability of Stafford Town Centre, providing a range of high quality shopping facilities in an attractive environment and easily accessible to residents and workers within the Borough. To achieve this the plan expects, where possible, to concentrate new retail development within existing centres. The key aims for the town are to:

- Increase the range and quality of shopping;
- Protect and enhance the physical appearance of the central core through environmental improvements;
- Ensure that the town centre is widely accessible by car, foot, bicycle and public transport; and
- Promote opportunities for investment in new food retail development within or adjacent to existing town centres.

To achieve these aims, Local Plan policies seek to promote new shopping development opportunities within or adjacent to existing centres whilst protecting Class A1 within the primary and secondary shopping areas by restricting changes of use to Class A2 and A3.

In addition to these general objectives, the Local Plan identifies two retail development sites at Queensway/Lammascote Road (which has now been developed by Asda) and the Staffordshire General Infirmary (currently under construction).

It is evident that the policies contained within the local plan reflect current changes that have occurred in national policy, notably the re-drafting of PPG6 in June 1996. However, we have examined the relevant policies in more detail in Section 3 of this report, providing objective advice on their relevance in terms of future retail trends and recommendations for possible re-drafting in any future local plan review programme.

2.5 Stafford Town Centre Strategy

A strategy outlining the Council's approach to the development and management of the town centre was adopted in 1997. Although the strategy is now slightly dated and many of the initiatives are either completed or underway, it still sets out a number of valid objectives which mirror many of the aims of the Local Plan.

The strategy contains a long list of broad ranging recommendations and actions which are grouped into five categories. They are:

1. Image, identity and heritage

- seek to expand the number of local/specialists shops to inter-mix with the full range of chain stores/multiples which are vital to any vibrant town centre;
- continue support for local heritage organisations; and
- preparation of a new historical guide book interpreting the town's past.

2. Environment

- Britain in Bloom and other related initiatives should be encouraged;
- The Borough Council to pursue Living Over The Shops encouraging Housing Associations and private landlords;
- The further provision of C.C.T.V. in co-operation with the Police;
- Implementation of visitors maps;
- A Town Centre Design Guide to be formulated; and
- Relevant partnerships to be established to develop and market Stafford as the County and University Town.

3. Accessibility and Transport

- A fully integrated transport package for Stafford to be devised and implemented;
- The signing policy should be kept under review and supplemented where necessary;
- The pedestrianisation programme to be taken forward in consultation with all stakeholders;
- Examine the provision of possible park and ride scheme particularly at Christmas;
- Encourage ways of increasing public transport usage;
- Encourage provision of safe cycle stands within suitable areas of the town;
- Review location of taxi ranks;
- Pursue the upgrading of Stafford railway station and its surrounding area; and
- Implementation of a Shopmobility Scheme to encourage disabled access.

4. **Retail**

- encourage competition;
- undertake regular Health Checks;
- promote market more actively; and
- produce a Shop Frontage Design Guide.

5. **Commercial Use**

- Examine reuse of potential vacant office space caused by local government re-organisation; and
- Recognise and support the commercial element of Stafford's role as the County Town.

6. **Leisure and Tourism**

- Promotion in partnership with other agencies of Stafford as a tourist centre must be encouraged, planned and implemented;
- The further provision of quality cafes and restaurants be encouraged within Stafford Town Centre;
- Continue to implement its policy for street cafes;
- Current programme of events should be increased if possible; and
- Encourage more street entertainment.

2.6 Town Centre Business Plan

A number of on-going initiatives are being pursued by the Council that seek to implement the objectives of the Town Centre Strategy and the Local Plan. The Business Plan for Stafford Town Centre has been developed in conjunction with the formulation of a Town Centre Standing Group. The Group has the responsibility of looking at five special areas that are of concern. They are:

- Investment
- Access and Transportation
- Security
- Marketing and Promotions
- Environment

The actions within this plan range from small-scale improvements through to key strategic objectives.

The analysis and conclusions set out in this report seek to build on, rather than replace, the initiatives identified within the above documents, providing additional evidence and objective advice on how the role of Stafford Town Centre should be progressed in the future.

3 PLANNING POLICY CONTEXT

3.1 Introduction

Planning policy on retailing and town centres has been constantly evolving over recent years, and, with the publication of PPG6 (Revised) in June 1996 and the primacy of the plan-led approach increasingly being demonstrated through decisions on planning appeals, successive governments have sought to ensure that the planning system provides a basis for a robust defence of town centres. Recent policy statements by government ministers have also emphasised the priority which is being given to ensuring that town centres are the focus of retail, leisure and office activity and, increasingly, become more attractive places for people to live.

Provided that Local Plans are up-to-date, set out a clear strategy for town centres, are based on sound research and identify sites (if required) in line with the sequential approach, they can be relied upon both to support the town centre and be a strong line of defence against retail and other applications which may arise in out of centre locations.

In the case of Stafford, the Local Plan was adopted in October 1998 and its policies and proposals reflect the principles set out in PPG6 (revised). The review of the Staffordshire Structure Plan is at an advanced stage, with adoption anticipated before the end of this year (2000). Both these plans emphasise the commitment to town centres for retailing and other key uses.

Clearly, the Council's future strategy for the town centre needs to continue to reflect the principles set out in PPG6 and subsequent ministerial statements, and also the principles of sustainability noted in PPG13 and evolving in draft PPG13 and recent government statements. We set out below the key messages set out in the guidance of relevance to consideration of the future of the town centre. We follow with a reference to PPG13. We also consider how this might affect planning policies for the town centre in the next review of the Stafford Local Plan.

3.2 Planning Policy Guidance 6: Town Centres and Retail Developments, June 1996

The main features in PPG6 on planning for town centres and retailing are:

- emphasis on a plan-led approach promoting development in town centres, both through policies and the identification of locations and sites for development;
- emphasis on the sequential approach for selecting sites for development, for retail, employment, leisure and other key town centre uses; and
- support for local centres.

The guidance also addresses the assessment of retail proposals and identifies key tests of impact on vitality and viability, accessibility by a choice of means of transport and impact on overall travel and car use.

PPG6 aims to sustain and enhance the vitality and viability of centres, to focus development where this would facilitate competition and provide opportunities for all forms of transport to be used.

Need

The guidance recommends the plan-led approach to identifying locations for new sites for development, following consideration of existing provision, in consultation with business interests and the local community. It states at paragraph 1.7 that:

"Development plans should plan positively for such uses, working with the private sector to assess need or market demand, and identify locations and sites for development".

Sequential Approach

PPG6 emphasises the sequential approach to site selection for new development proposals, including retail, employment, leisure and other key town centre uses. Town and district centres are the preferred locations for such developments. In addition, the guidance recognises the need for the identification and assessment of sites in a range of locations. Such an approach is appropriate for both developers and the local authorities in assessing new sites.

However, what is also important is that the guidance stresses that the sequential test and site selection exercise should be undertaken after carefully considering the need for development. Clearly, if need is not demonstrated, then the identification of future sites is not necessary. Paragraph 1.10 identifies that:

"In drawing up their development plans, local planning authorities should, after considering the need for new development, adopt a sequential approach to selecting sites for new retail development. Both local planning authorities and developers selecting sites for development should be able to demonstrate that all potential town centre options have been thoroughly assessed before less central sites are considered for development of key town centre uses".

3.3 Mr Caborn's Statement, February 1999

In response to a Parliamentary Question from Alan Johnson MP, Mr Caborn gave a statement the intention of which was to add to and clarify the guidance in PPG6 in the light of a number of issues raised in recent litigation which concern the interpretation of PPG6 and Government Policy.

Clearly, Mr Caborn's statement further supports the plan led approach and advises local authorities that **"in preparing strategies and policies, to consider the need for new retail and leisure development".**

In order to help clarify the position set out in Paragraph 1.10 in PPG6 (highlighted above) Mr Caborn states that, **"having established that such need exists, local planning authorities should then adopt a sequential approach (as explained in PPG6) to identify suitable sites. If there is no need for further developments, there will be no requirement to identify additional sites."**

The statement attempts to clarify exactly what constitutes 'need' and how it should be assessed. On this matter, Mr Caborn suggests that **"the requirement to demonstrate 'need' should not be regarded as being fulfilled simply by showing that there is capacity (in physical terms) or demand (in terms of available expenditure within the proposal's catchment area) for the proposed development. Whilst the existence of capacity or demand may form part of the demonstration of need, the significance in any particular case of the factors which may show need will be a matter for the decision maker."**

What is clear from the above is that there are other issues which must be taken into account when considering need and evidence of capacity of itself is not sufficient justification. Qualitative issues, for example, should also be taken into account as part of examining need and there may be other factors relevant in individual situations. Clearly, if there is limited demand (in expenditure terms) for a proposed development, it should not be ruled out solely on this factor. Wider considerations such as serving the local community needs or the significant enhancement of the range and quality of goods currently on offer should also be examined.

If the applicant fails to demonstrate need as outlined above, then Mr Caborn states clearly that this **"would normally justify the refusal of planning permission unless there were weighty additional material considerations".**

Recent interventions by the Secretary of State by way of the 'call in' procedure, particularly on retail schemes, and recent appeal decisions have demonstrated the government's determination to take a robust approach to the preservation of the town centre as the main focus of retail, leisure and business activity.

3.4 Planning Policy Note 13: Transport, March 1994 and Consultation Draft PPG 13 (Revised), October 1999

The current PPG13 identifies how local authorities should try to integrate transport and land-use planning in ways that will reduce growth in the length and number of motorised journeys, encourage alternative means of travel, and reduce reliance on the private car.

PPG13 notes that the location and nature of development affect the amount and method of travel and that patterns of development are influenced by infrastructure and transport policies within development plans.

In terms of the location of development, PPG13 identifies that major generators of travel should be located within existing centres and/or be highly accessible by means of travel other than the private car. Development should help maintain and improve choice for people to walk, cycle or catch public transport rather than drive between homes and facilities used regularly.

Retail and leisure development

PPG13 re-iterates advice in PPG6 concerning the sequential approach to retail and leisure developments and emphasises that local plan policies should seek to maintain and revitalise existing shopping centres and should concentrate facilities in town centres and other locations well served by public transport. Town centres should be the preferred location for retail and travel intensive leisure uses.

The revised draft PPG13 (published for consultation in October 1999) builds on the theme of planning for sustainability, seeking to reduce dependency on the private car and contributing to social inclusion by ensuring that development is accessible by public transport for those without use of a private car. A key objective is to ensure that jobs, shopping, leisure and services are highly accessible by public transport, walking and cycling and the draft guidance advises local authorities to take account of accessibility issues when preparing development plans.

Draft PPG 13 advises a co-ordinated approach to issues of parking policy and the location of development to ensure the promotion of sustainable transport choices. Issues such as levels of parking, parking controls, charging, and the shared use of car parking can influence the choice of means of transport. However the advice stresses the need for a consistent approach to parking standards to ensure that centres do not compete with one another on the basis of the availability of parking. Draft PPG13 sets out maximum parking standards to be applied nationally to key land uses including retail, leisure and offices.

3.5 Local Plan Policies

The Stafford Local Plan includes policies which seek to protect and enhance the town centre. It defines a town centre boundary on the Proposals Map and, within the identified town centre, it defines retail frontages as core primary, primary, and secondary, with separate policies for each.

Local Plan policies have proved robust in support of the town centre and Stafford has not seen a growth in out of centre retailing which has often been a feature in towns of a similar size. In particular the provision of modern foodstores in, and on the edge of, the town centre has resulted in a significant number of linked trips by shoppers to other shops and services within the town centre contributing to the vitality and viability of the centre.

The next review of the Local Plan will provide an opportunity to consider whether any changes in policy are appropriate to ensure the continued prosperity of the centre beyond 2006. It may well be that a further review of PPG6 will have been published by that time; this may necessitate adjustments to existing policies. In addition, we believe that consideration should be given to extending the town centre boundary to the southwest as far as Newport Road, and, possibly, also to include the station area. Within the town centre, any potential development/redevelopment sites should be identified.

The current version of PPG6 provides advice to local authorities on local plan policies. It gives guidance on the use of frontage policies. We consider that it is appropriate in Stafford to include frontage policies in the local plan. However we believe that it would be helpful to provide a little more flexibility by redefining the frontage policies to include two types of frontage - primary and secondary – rather than the three types identified in the current local plan. We suggest therefore that consideration should be given to amalgamating the core primary and primary frontage definitions. This will probably lead to the need for some adjustment to the frontages to which they are applied; in particular, we feel that Bridge Street should be redefined as secondary frontage to enable a consolidation of A3 uses in this area. We do not believe this would be detrimental to the vitality and viability of the town centre; on the contrary we believe it would assist the regeneration of the southern part of the town centre.

4 TOWN CENTRE APPRAISAL

4.1 Stafford Town Centre's Role

As the county town, Stafford is an administrative centre for the county and various County Council offices and functions are located in the town. The town centre serves as a focus for retail, commercial and leisure facilities for the population of the town itself and surrounding areas including Eccleshall and Stone. The town's student population also looks to the town centre for shopping and entertainment. However the town centre's role, particularly in relation to shopping, is limited to some extent by the proximity of larger town centres nearby including Hanley, and other higher order centres such as Wolverhampton.

Comparison with a number of other centres in the West Midlands using recent Goad floorspace data illustrates Stafford's relative position in terms of scale.

Centre	Floorspace sq m	No of Units	Regional Rank
Cannock	39,950	170	31
Stafford	**63,840**	**292**	**15**
Stoke-on-Trent (Central)	28,630	173	Not listed
Stoke-on-Trent (Hanley)	114,010	516	5
Telford	53,900	146	16
Wolverhampton	135,930	704	4

Source: Goad, 1998 & 1999

The regional ranking position noted in the above table is based on a ranking system devised by Experian Goad highlighted in Section 2.

4.2 Floorspace And Trade Mix

As noted above, Stafford town centre has a total of 63,840 sq m floorspace in 292 units. This is based on the most recent Goad survey undertaken in February 1999 and represents the ground floor footprint of premises in the town centre as defined by Goad. Goad survey information is therefore normally used as an approximation for gross floorspace and enables comparisons to be readily made with other centres, as well as with national statistics.

Trade Mix	% Gross Floorspace		% No of Units	
	Stafford	GB	Stafford	GB
Food/convenience	19.2	14.3	9.3	9.6
Comparison	55.0	53.7	57.2	49.5
Service	17.1	20.2	23.6	27.0
Vacant	7.8	10.1	9.3	12.6
Miscellaneous	0.8	1.7	0.7	1.3

Source: Goad, 1999

Comparison with national Goad data for trade mix shows that Stafford has a strong representation of convenience goods floorspace with both Tesco and Sainsbury stores within Goad's defined town centre. Comparison goods floorspace is slightly above the national average confirming Stafford's role as a non-food retail centre for the town and its surrounding area.

Conversely, representation of service trades is lower than nationally, both in terms of floorspace and number of units. This category includes pubs, restaurants, cafes and fast food outlets and services such as hairdressers and dry cleaners. Travel agents and estate agents are also included in this category as are financial services such as banks and building societies. Catering facilities are particularly under-represented with 7.2% of the total floorspace, compared with 10.5% nationally, or 3.7% of the total units compared with 7.2% nationally.

At the time of the Goad survey, some 27 outlets were vacant (ie 9.3% of the total) compared with the national average of 12.6%. Our own survey undertaken in December 1999 indicated that there had been some turnover in vacant units with the overall total remaining low at 27 outlets. The vacant units are generally distributed throughout the centre, although there is a current concentration of vacant units in the Sheridan Centre.

Size of Unit (ground floor area)	Proportion of Total Number of Units (%)	
	Stafford	GB
Under 1,000 sq ft	33.5	37.2
1,000 - 2,499 sq ft	43.2	43.8
2,500 - 4,000 sq ft	14.8	12.1
5,000 - 9,999 sq ft	4.7	4.1
10,000 - 14,999 sq ft	1.8	1.2
15,000 – 19,999 sq ft	0.7	0.6
20,000 - 29,999 sq ft	1.1	0.5
30,000 sq ft and above	0.4	0.5

Source: Goad plans (Feb 99)

From the above table it is evident that Stafford has a good range of units in terms of size, including medium and larger sized units normally sought by national multiples. Unlike many older town centres, Stafford does not have a high proportion of small premises which are often difficult to let because they do not meet the needs of modern retailing and service uses.

4.3 Retailer Representation

One measure of the relative success of a town centre is the number of multiple retailers present. Clearly regional and sub-regional centres have the greatest concentration of multiples, as many of the major operators determine store locations on the basis of catchment populations.

However we believe that Stafford town centre currently has a very good representation of high street multiples with 149 multiple retailers represented and a good range of other high street names, for example Thomas Cook, Yates Wine Lodge and McDonalds.

Comparison with other centres in the area confirms that only Telford has a higher proportion of multiple outlets than Stafford. (As a new town, Telford has a purpose built shopping centre and has an unusual retail profile). Both Hanley and Wolverhampton, which are significantly larger centres, have a lower proportion of multiple outlets.

Centre	No of Multiple Outlets	%
Cannock	82	48.2%
Stafford	**149**	**51.0%**
Stoke-on-Trent Central	37	21.4%
Stoke on Trent Hanley	223	43.2%
Telford	118	80.8%
Wolverhampton	267	37.9%
GB average		**34.1%**

Source: Goad, Retail Centre Ranking, 1998

4.4 Charity Shops

An issue which is often raised is the number of charity shops in town centres. These are sometimes considered to be detrimental to the quality of town centres due to the image of selling second-hand goods and, in some cases, poor quality window displays. The view is also sometimes expressed that charity shops have a damaging effect by drawing trade from local traders.

The presence in town centres of charity shops is not unusual and there are, in any event, no planning controls available to discriminate against them, even if it were thought desirable to do so. In Stafford there are currently 9 charity shops. We believe that this number is unlikely to have a significant effect on levels of trade in the town centre. In general, charities are now well aware of the need to provide attractive window displays and standards are improving. We believe that charity shops are now an accepted part of the town centre retail offer.

4.5 Independent Traders

Although most town centre ranking systems are heavily weighted to reflect the position in relation to multiple traders, in our view it is also important for a successful town centre to have a good range of quality independent traders. It is these traders which contribute to the unique character of town centres. Inevitably many of them will be found in the more secondary locations since few independent traders can afford to pay rental levels in the prime pitch.

Stafford has the advantage of having a good variety of independent traders which, although in secondary locations, are nonetheless close enough to the prime pitch to take advantage of the level of pedestrian activity generated by key multiples. A prime example of this is Mill Street, which offers a number of specialist retailers close to the prime shopping core of Greengate Street.

4.6 Vacancy Rates

As noted earlier, vacancy rates in Stafford are lower than the national average. The situation with regard to vacancies has improved in recent years.

Vacant Units							
Jan 1992		**June 1995**		**Feb 1999**		**Dec 1999**	
No	%	No	%	No	%	No	%
38	13.8	40	14.7	27	9.3	27	9.6

National average (Feb 1999): 12.6%

Source: Goad surveys & Chesterton (Dec. 1999)

Vacancy rates provide an indication of a centre's vitality and viability, although they cannot be used in isolation. The majority of town centres are experiencing a decline in the number of vacant units from the peak levels that occurred in 1993-94 as a result of the recession. However in Stafford's case, the vacancy rate is significantly below the national average and this does tend to confirm a level of interest and commitment on the part of town centre traders, both the national multiples and the independent traders.

4.7 Rents And Yields

PPG6 advises that information on rents and yields is useful (in conjunction with other indicators) in assessing the health of town centres. Yields provide a measure of investor confidence in the long term profitability of the centre, while rental levels reflect demand and to some extent the relative popularity of the centre with multiple traders.

Both these indicators need to be used with caution, particularly in the case of smaller centres where limited numbers of transactions may be involved, and data availability is limited. This applies especially to investment transactions.

The most recent information on Zone A rents relates to 1997 and shows the relative position of Stafford and other centres.

Zone A rental levels

Centre	Zone A Rental Levels (£/sq m)
Cannock	355
Stafford	**645**
Stoke-on-Trent (Hanley)	970
Telford	1185
Wolverhampton	1025

Source: Focus,1999

Our discussions with local commercial agents suggest that the highest rents are achieved at the southern end of Gaolgate Street, and the northern end of Greengate Street and Zone A rental values of £645 - £700 per sq m are being achieved (£60 - £65 per sq ft). Rental levels are slightly lower in the Guildhall Centre at around £590 per sq m (£55 per sq ft).

Rental levels for offices are relatively stable at around £45 per sq m (£4 per sq ft) reflecting limited demand and local agents report that office space is difficult to let with a surplus of available space relative to the demand. Demand tends to be from the local market, including small professional businesses.

As noted above, information on yields is limited and of limited value, especially for smaller centres such as Stafford. The table below provides some comparative information for 1988 (at the height of the property boom of the 1980's), 1992 (during the recession), and 1998. (There is no information available for smaller towns such as Cannock or Telford – in the case of Telford, the centre is in a single ownership and IPD does not cover such centres).

A low yield indicates a centre is attractive to investors; conversely a high yield indicates a centre is less attractive to investors. Thus larger centres can normally be expected to achieve lower yields than smaller ones.

Retail Yields

Centre	Yield %		
	1988	1992	1998
Stafford	7.3	9.7	9.1
Stoke on Trent	5.8	9.0	7.4
Wolverhampton	6.2	8.5	6.5
All centres - Staffordshire	6.4	9.2	8.3

Source: Investment Property Databank, 1999

Yields in Stafford have followed the general trends in the retail property investment market over the last ten years or so, although consistently higher than larger, higher order centres in the sub-region. This is broadly what might be expected. The current expectation is that yields for the more successful centres will continue to decrease slowly over the next few years, although many analysts doubt whether the low yields of the late 1980's will be achieved in the foreseeable future.

4.8 Diversity Of Uses

PPG6 recognises that a town centre's vitality and viability is dependent not only on its retail function but also on the mix of uses which contribute to the centre's attractiveness to those who live and work there. Leisure and entertainment facilities, cafes, bars and restaurants add variety and can assist in promoting the evening economy.

As a county and university town, Stafford town centre is a focus of activity and is able to sustain a good diversity of uses to complement the retail function. In the service sector, these include banks and building societies, hairdressers, dry cleaners, travel agents and estate agents. There are a number of small professional offices in addition to the administrative office of the Borough and County Councils but Stafford is not a major office location.

As noted earlier, catering, including cafes, bars and restaurants, is a sector that is under-represented in Stafford when compared with national averages both in terms of the number of units and the amount of floorspace. Given its student population and the town's attractiveness as a tourist/visitor centre, this is perhaps a little surprising.

The Stafford Gatehouse Theatre, which is a venue for music, dance and film as well as plays, is a particular asset to the town and is conveniently located close to the heart of the town centre. Other leisure/tourist facilities include the Shire Hall Gallery, and Ancient High House Museum, the Library, Apollo Cinema, and the Riverside Leisure Centre.

The Market Square, although not home to a regular market, is used for speciality markets and other events. This is a significant and attractive focal point in the town centre and could perhaps be used more intensively.

Civic and administrative functions are well represented, reflecting the town's role as County town of Staffordshire, with uses including police station, Magistrates and County Courts and County Records Office, as well as Borough Council and County Council Offices. Stafford College is also located in the town centre. These functions bring additional visitors to the town centre providing opportunities for spin off trade to town centre shops, restaurants and other facilities.

In summary, we believe that there is a good range of uses in Stafford Town Centre and these contribute significantly to the vitality and viability of the town.

4.9 Upper Floors

Typically, in traditional town centres, upper floors above shops and other premises are used in a variety of ways including offices, storage (usually associated with a ground floor retail use) and residential. Upper floors are frequently vacant or underused, although it is not always easy to determine the extent of under utilisation without undertaking detailed survey work.

Our impression is that Stafford town centre fits this typical profile in terms of the use of upper floors and that there may well be scope for initiatives such as 'Living over the Shop' to convert vacant or underused premises for residential use. We note from the Town Centre Strategy that the Council has approved in principle a policy of encouraging the conversion of upper floors into accommodation for appropriate groups such as students, single people and childless couples. This is very much in line with government advice in PPG6 and elsewhere.

4.10 Accessibility

Public Transport

Stafford is well located to take advantage of the strategic rail network, with Stafford station being a key stopping point on the West Coast Main Line and also a designated Eurostar stop. Thus it has excellent links with Manchester, London and potentially with mainland Europe.

The station is relatively well located on the edge of the town centre, although pedestrian links to the town centre could be improved with better signage and a more pedestrian friendly environment. The station buildings and forecourt area do not provide a particularly attractive arrival point for visitors to the town; we understand however, that a programme of improvements by Railtrack and Virgin is in hand.

The urban area of Stafford is reasonably well provided with weekday bus services with routes focusing on the town centre. Most services operate during the evenings, although less frequently. Saturday services are also reasonably good. Sunday services are more limited, but better than in many towns of similar size.

In additional to urban services there are bus services to neighbouring towns such as Rugeley, Lichfield, Tamworth, Cannock, Telford and Wellington and limited services to rural areas.

Bus stops are conveniently located in the town centre in a variety of locations close to main retail core. There is no central bus station, but we do not regard this as a drawback. On the contrary, many towns are redeveloping town centre bus stations and giving priority to providing bus stops close to the main focus of activity.

Whilst it is always desirable to enhance both the quality and quantity of bus services, we believe that Stafford is reasonably well served.

Access on foot and by bicycle and for disabled people

Although relatively few people live within the town centre, there are a number of residential areas in close proximity and, from our observations, a number of residents do walk into the town centre (13.5% of respondents in the shopper survey walked to the town centre). The provision and/or enhancement of safe and convenient pedestrian and cycle routes (segregated where possible) will encourage greater numbers of people to access the town centre in this way. We note the Town Centre Management Business Plan includes proposals for provision of secure cycle parking and this would clearly be a helpful initiative.

We note that a shopmobility scheme is in place to assist disabled people in the town centre and town centre car parks provide dedicated free parking spaces for disabled people using cars. The continued, and where possible enhanced, provision of convenient parking and easy access for wheelchairs and the ambulant disabled is important; experience elsewhere confirms that such factors are critical in determining usage by disabled people, the elderly, their carers and families.

Car Access and Parking

Access to the town centre for cars is good, with the ring road facilitating access from all directions. Car parks are convenient and well distributed around the town centre, with a mix of long and short stay parking available. Car parks appear to be well used, and if any loss of parking occurs, for example as a result of redevelopment, consideration will need to be given to how this loss can be made up.

Car parking charges appear to be reasonable in striking a balance between short and long stay parking and season ticket charges represent good value for those who work in the town centre who wish to use their car.

Currently there are approximately 2500 public parking places available during the week with an additional 1330 available on Saturdays. (These figures are based on information set out in a leaflet prepared by the Council on public car parks in the town centre)

We consider that the number of parking spaces is adequate to meet the current requirements; there is no evidence to suggest that shoppers and other visitors are deterred from visiting the town because of a lack of convenient parking. Nor do we consider that the charging structure is unreasonable. All but the smallest town centres now charge for car parking and shoppers are accustomed to paying a modest charge.

The charging regime in Stafford provides for a reasonable turnover of spaces in the car parks which are most convenient for town centre shops and facilities, with long stay parking available in the outer car parks.

Direct comparison with other centres is possible using Goad data. However, it must be borne in mind that Goad definitions of town centres do not relate to local plan or UDP boundaries and are often historic.

Also, where car parks fall outside of the Goad town centre boundary, they may not be included in the car parking figures even though these car parks may serve the town centre and be well related to it. The figures provided by Goad for numbers of car parking spaces are also in some cases approximated, based on measurement of the area of the site.

Therefore, the figures shown in the table below for Stafford are lower than the actual figures provided by the Council.

Centre	Total Floorspace - sqm	No of Public Parking Spaces	Parking to Floorspace Ratio
Cannock	39,950	1,600	1 : 25
Stafford	63,840	2,200	1 : 29
Stoke-on-Trent	28,630	560	1 : 51
Hanley	114,010	3,100	1 : 37
Telford	53,900	6,800	1 : 08
Wolverhampton	135,930	5,200	1 : 26

Source : GOAD 1999

In broad terms, levels of parking in Stafford Town Centre are comparable with levels in Cannock and Wolverhampton and compare favourably with Stoke-on-Trent and Hanley. Telford Town Centre has an abnormally high car parking to floorspace ratio which is due in part to the centre being purpose built as a New Town and also because of the high office content in the town centre which is recorded on the Goad map.

As noted above, whilst we consider that parking provision is adequate in Stafford Town Centre it will be important to ensure that, should any of the existing car parks be lost through redevelopment, that adequate parking is found in a location which is convenient to the town centre.

4.11 Town Centre Environment

Stafford Town Centre contains a mix of modern and traditional older buildings with some extremely attractive frontages and some outstanding historic buildings. Market Square and Greengate Street are particularly pleasant, and the events area in Market Square benefits from the pleasant surroundings.

The town centre has been attractively pedestrianised, enhancing the townscape quality and providing a safe and pleasant environment for shoppers and other visitors to the town centre. Pedestrian routes to bus stops and car parks are convenient and direct. Street furniture complements the historic buildings and there is marked absence of litter and rubbish in the streets.

The various initiatives being promoted through town centre management are obviously having a positive effect on the town centre, including measures such as the implementation of CCTV and involvement of the police in crime prevention and dedicated personnel in town centre policing. We note from the figures included in the Town Centre Management Business Plan that levels of recorded crime in the town centre are relatively low. Certainly there is little or no visible evidence of vandalism, graffiti or fly posting. Initiatives such as the Britain in Bloom campaign also enhance the attractiveness and character of the town centre. We note that there are proposals to enhance the more peripheral areas of the town centre, such as the riverside, included in the Town Centre Management Plan. We agree that the riverside area is an underused asset and enhancement to create a leisure route with attractive links to the town centre would enhance some of the more peripheral areas and begin to open up opportunities for further improvements to adjacent sites.

There are likely to be limited opportunities for further pedestrianisation in the town centre other than as part of redevelopment proposals, given the high degree of pedestrianisation already achieved. The Bridge Street area is one where improvements to the pedestrian environment would be beneficial, and consideration should also be given as to how links to the railway station for pedestrians could be improved.

Overall, in our view Stafford Town Centre compares favourably with other town centres we have studied in terms of environmental quality, when judged against the following criteria:

- Number, quality and condition of historic buildings:
- Extent of pedestrianisation;
- Quality of street furniture;
- Absence of litter and graffiti;
- Quality of public realm; and
- Quality of hard and soft landscaping.

As noted above, some of the more peripheral areas of the town centre including the Bridge Street area and the riverside would benefit from enhancement in particular, to provide a more pedestrian friendly environment to improve overall landscape quality.

5 ORIGINAL MARKET RESEARCH

5.1 Introduction

A key element of this study was to obtain a detailed understanding of Stafford's potential catchment and the shopping patterns that currently exist within it. Clearly, one of the most accurate ways of understanding such critical issues is through original market research. As highlighted in our methodology in Chapter One, this involved the completion of three separate yet interrelated surveys. They included:

- **A Household Telephone Survey** - which interviewed 750 households throughout the defined catchment;

- **A Town Centre Shopper Survey** - which interviewed 289 shoppers in Stafford Town Centre spread over three days (Thursday, Friday and Saturday); and

- **A Postal Occupier Survey** - which was delivered to 150 businesses who are currently active within the Town Centre.

Key findings from each of these surveys have been highlighted below.

5.2 Household Telephone Survey

The catchment area adopted for the Household Telephone Survey is defined and explained in Section 6. However, key findings of the survey are:

Convenience Shopping

- 79% of main food shopping trips in Stafford's primary catchment are concentrated within the Stafford Town Centre with Sainsbury being the most popular store followed by Asda and then Tesco.

- 71% of people shop once a week with a small number shopping twice a week (10%) or once every two weeks (8%). The most popular days for convenience shopping are Thursdays and Fridays but over a third of shoppers (36%) have no regular day for main food shopping.

- 87% of those surveyed spend £25 or more on their main convenience shopping trip.

- 67% of those surveyed shop elsewhere for food and other products between their main shopping trips. Over a quarter of people use these stores on a weekly basis (27%) with 7% using these stores on a daily basis.

<u>*Combination Trips*</u>

- 35% of people said that they did combine their shopping trip with other shops to either buy clothes etc, or to services such as banks, building societies or the post office. Sainsbury has the highest proportion of linked trips with 43% of shoppers combining a main food shopping trip with other town centre facilities.

- Of the people who combine shopping trips, over half combine them with trips to banks and building societies (58%) and 43% combining it with trips to go clothes shopping.

<u>*Comparison Shopping*</u>

- Of those surveyed from the primary catchment, (72%) buy most of their household's non-food items (clothing, footwear, fashion goods etc.) from Stafford. Within the catchment as a whole, nearly 40% use Stafford Town Centre for comparison goods shopping.

- 97% comparison goods shoppers start their trip from home with the majority travelling by car (79%) and only 14% travelling by public transport.

Leisure Activities

- 36% of people surveyed said they attend the cinema. Of these, 76% from within the primary catchment visit the cinema in Stafford with the next most popular cinema in Walsall attracting only 8% of those interviewed from within the PCA.

- Of those who go to the theatre, 43% from within the PCA attend the theatre in Stafford with 18% travelling into Birmingham and 8% to Wolverhampton.

- 88% of those who visit pubs and restaurants from within the PCA do so within Stafford. Not surprisingly, there is a strong correlation between where people participate in this leisure activity and the area within which they live. As well as pubs and restaurants, 88% of people visiting nightclubs do so in Stafford.

- 27% of people surveyed in the PCA participate in leisure centre activities in their spare time. Of these, over 90% attend leisure centres in Stafford.

- There was little response when respondents from the PCA were asked if there were any leisure facilities they would like to see in Stafford town centre. The need for more restaurants had the highest response although at only 9%.

5.3 Town Centre Shopper Survey

Shopping Patterns

- 55% of people surveyed said that their main reason for going shopping to Stafford Town Centre was to buy non-food goods. The other main reason for people to go to Stafford is for the services accounting for 16%.

- 85% of people travelled straight to the Town Centre from home. 61% of these people are located in Stafford, 6% from Stone and 5% from Rugeley.

- A quarter of people surveyed shop in Stafford one day a week and 47.8% shop between two and five days a week.

- 32% said they were going to be shopping in the market

- Other centres frequently visited for non-food goods include Wolverhampton, Stoke-on-Trent, Telford and Birmingham.

- 60% of people surveyed had not visited a retail warehouse in the last month. Among those who had, the most popular warehouse visited (18%) was the B&Q DIY superstore, Silkmore Lane Stafford.

- When asked what was liked about Stafford as a shopping centre the three most popular answers in order were; near to home (42.6%), choice of shops (12.8%) and the character of the centre (11.1%).

- The three most popular answers when asked what was disliked about Stafford as a shopping centre were; choice of shops (25.3%), absence of named shops (12.5%) and difficulty of parking (12.5%).

Travel

- Overall, the majority of people travelled to Stafford Town Centre by car (64%), while 21.4% travelled on public transport and 13.5% travelled by foot. The time taken to travel to the shopping area varies although over half travelled for ten minutes or less and 45% travelling between ten and thirty minutes.

Leisure Activities

- 48% of people surveyed go to the cinema in their leisure time. Of these half attend the Apollo in Stafford, with 14% going to the Showcase in Walsall and 8% to Festival Park in Stoke-on-Trent. Although these figures are below the participation rates identified within the Household Survey, it must be noted that the figures quoted in 5.2 represent those people that live within the primary catchment area of Stafford therefore we would anticipate a greater level of patronage for the Apollo.

- Of the 24% of people that attend the theatre in their leisure time, 56.5% go to the theatre in Stafford, with 14% attending the theatre in Stoke-on-Trent and 8.7% in Birmingham.

- 73% of those surveyed visit pubs and restaurants as part of their leisure activities. Of these three quarters visit pubs/restaurants in Stafford.

- 21% of people surveyed participate in leisure centre activities in their spare time of which three quarters come to Stafford for such purposes.

- There was no dominant reply when people were asked if there were any leisure facilities they would like to see in Stafford town centre. The highest response was 12.5% who would like to see a nightclub in Stafford Town Centre.

5.4 Town Centre Occupier Questionnaire

Survey Structure

As part of the study, a survey of commercial occupiers within the town centre was undertaken. A large sample (150) of retail and service occupiers from across the town centre were contacted by letter and asked to complete a questionnaire.

The occupiers were asked to give their views on:

- their current and future trading performance;
- their future plans to improve or rationalise their premises;
- the main strengths and weaknesses of Stafford Town Centre;
- how Stafford Town Centre could be improved;
- the competition from surrounding town centres; and
- town centre management activities.

The survey resulted in the receipt of 42 responses, which equates to a response rate of 28%. As will all postal questionnaires, response rates are never particularly high. However, in comparison to other centres where we have use a similar method, we generally achieve a response rate between 20 and 25%.

The 28% response rate is especially encouraging as the questionnaires were delivered in early December when the pressure on local traders time was probably greater than at any other time of the year.

Responses were received from occupiers in all areas of the town as shown below.

Location of Premises	**Respondents**	
	No. of Units	%
Gaolgate St	9	22
Mill St	5	12
St Johns Market	4	10
Mount Row	3	7
Crabbery St	4	10
Guildhall Shopping Centre	3	7
Princes St	3	7
Salter St	3	7
Greengate St	2	4
Market St	2	4
Other	4	10
Total	**42**	**100**

Length of Trading of Respondents

Occupiers were asked how long they had been trading at their current premises. A strong core of occupiers have been located in the town for over 30 years (26%) and there is also a high proportion of traders who have occupied their premises for at least one, and up to fifteen, years. These figures indicate a low turnover of occupiers in Stafford and suggest that occupation, in general, is reasonably stable.

Length of Trading	Respondents	
	Number	%
Less than 1 yr	4	9
1-5 yrs	8	19
6-10 years	7	17
11-15 years	5	12
16-20 years	2	5
21-30 years	3	7
over 30 years	11	26
Unknown	2	5
Total	**42**	**100**

Property Tenure & Ownership

The majority of commercial premises within the town centre are leasehold (76%) with only a small proportion of properties being occupied on a freehold basis (12%). It is apparent from the survey that all five of the owner-occupiers (who responded) have been active in Stafford for at least 25 years.

Ownership	Respondents	
	Number	%
Leasehold	32	76
Freehold	5	12
Unknown	5	12
Total	**42**	**100**

Customer Base

Occupiers were asked which type of customer their business primarily relies on. The table below indicates that nearly all occupiers rely primarily on local residents from within Stafford, for their trade. There is very little reliance on the office sector, business visitors or tourists/leisure visitors and only a small proportion of businesses are reliant on residents from the wider area of Staffordshire.

Type	Respondents	
	Number	%
Local Residents (Stafford)	37	88
Other residents in Staffs	5	12
Office employees	3	7
Tourist/Leisure Visitors	2	4
Business Visitors	1	2
Total	**42**	*

* Figures exceed 100%, as some occupiers place equal reliance on more than one customer sector

Trading Performance

Occupiers were asked about their current and future trading performance and also about the constraints, which currently impact upon the success of their business. The table below suggests that the majority of respondents are generally trading well with over 80% having either satisfactory or buoyant trading levels.

This level of trading confidence contrasts starkly with other centres we have surveyed where at best, 42% consider their trading to be satisfactory and only 7% consider their trading levels to be buoyant.

Current Trading Performance

Performance	Respondents	
	Number	%
Buoyant	7	17
Satisfactory	27	64
Poor	8	19
Total	**42**	**100**

As regards, future trading performance, a significant majority of occupiers (60%) anticipate that there will be some improvement in their trading position over the next 12 months. Only 7% expected the future year to be worse.

Future Trading Performance

Performance	Respondents Number	%
Improves	25	60
Stays the Same	10	24
Declines	3	7
Don't know	4	9
Total	**42**	**100**

Occupier's views on future trading performance appear to be fairly optimistic with 60% anticipating that their trade will improve. This level of optimism appears to be in line with surveys completed elsewhere where two thirds of traders consistently believe that trading will improve.

The most significant constraint on the current trading performance of occupiers appears to be simply the insufficient number of visitors to Stafford town centre; which arises due to the proximity of other competing centres. Inadequate car-parking, in terms of both its quantity and its cost is also regarded as a significant factor, as are the high rents/overheads costs of many units, (including rates).

Constraints On Future Trading Performance

Constraint	Respondents Number	%
Rents/Overheads	20	48
Quality/Size of Current premises	10	4
Car-Parking	21	50
Competition from other Stafford traders	13	31
Lack of visitors to Stafford (competition from other centres)	28	66
Security	3	7
Inadequacy of premises	8	19
Location	6	14
Quality of environment/town centre management	9	21
Other	4	9
Total	**42**	*

* Figures exceed 100%, as some occupiers identify more than one constraint on performance

Some of the other constraints which were identified by respondents in the study include wider economic trends (which affect prices and spending); the limited opening hours of the market; and also traffic congestion.

Strengths & Weaknesses

Occupiers were asked to give their views on the strengths and weaknesses of Stafford Town Centre and the results are set out below.

Main Strengths of Stafford	**Respondents**	
	Number	%
Quality of the Environment	18	43
Availability of car-parking	12	28
Range/Quality of Shops	12	28
Range/quality of leisure/entertainment facilities	6	14
Total	**42**	*

* Figures exceed 100%, as some occupiers identify more than one strength

It is evident that the majority of respondents regard the quality of Stafford's environment as its most significant asset and that the range and quality of shops is also a key strength. Leisure and entertainment facilities are not considered by many respondents to be a main strength of the town.

A number of other strengths were also cited by occupiers which included the fact that Stafford has a wealthy hinterland, (giving a high degree of disposable income), that there is comprehensive pedestrianisation of the centre and that the town has a historic core.

Main weaknesses	**Respondents**	
	Number	%
Poor Range/quality of shops	25	59
Lack of parking	24	57
Traffic congestion	23	55
Poor range/quality of leisure/entertainment facilities	11	26
Poor quality premises	2	5
Poor quality environment	3	7
Other	17	40
Total	**42**	*

* Figures exceed 100%, as some occupiers identify more than one weakness

The table above demonstrates that occupiers have identified 3 main weaknesses of Stafford Town Centre. They are; its poor range and quality of shops, its lack of car parking provision and itś traffic congestion.

We are not surprised that traders are concerned about the lack of parking and congestion, as this is normally trader's most common weakness of any town centre. However, the poor range and quality of shops does not usually appear as the most common weakness although many traders appear to expect that Stafford should have a similar range of multiples as Hanley.

Other weaknesses which were identified by a number of occupiers include the costs of car-parking, particularly for longer stays; the poor accessibility into the town including unclear signage and the confusing one-way system; and too many pubs, cafes, banks and other financial premises, in units which might be better used for retail purposes.

Future Property Requirements

Occupiers were asked about their requirements for the future. The results are set out in the table below.

Future Plans	**Respondents**	
	Number	%
No plans	26	62
Refit, Extend, Improve Premises	9	21
Close or Relocate outside Stafford	1	2
Relocate to new premises within Stafford	4	10
Other	2	5
Total	**42**	**100**

The majority of occupiers (62%) have no plans to change or move from their premises and only 2% are likely to be closing or relocating outside Stafford altogether. This is not surprising given the responses to the length of trading question noted previously.

Views on Developments in Competing Towns

Occupiers were asked their views on which shopping centres currently compete with Stafford. Hanley was most commonly cited as the main competitor, with Stoke and Telford also being regarded as important.

Shopping Centre	**Respondents**	
	Number	%
Hanley	31	74
Merry Hill	18	43
Wolverhampton	21	50
Telford	20	48
Stoke on Trent	8	19
Other	14	33
Total	42	*

* Figures exceed 100%, as some occupiers noted more than one centre

Improvements to Stafford Town Centre

Occupiers were asked what improvements they would like to see in Stafford town centre.

Improvements	**Respondents**	
	Number	%
More/better car parking	29	69
Better bus or rail services	12	28
More clothes shops	15	36
More food and grocery shops	6	14
More tourist/gift shops	4	10
More shops in general	32	76
More entertainment/leisure facilities	13	31
More/better seats, litter bins etc	2	5
Better pavements and general environment	6	14
Better security	10	24
More/better toilets	14	33
More eating places	7	17
Other	7	17
Total	42	*

* Figures exceed 100%, as some occupiers identify more than one improvement

Two responses were significantly more common than any other, with 69% of occupiers citing more/better car-parking and 76% citing more shops in general as the most necessary requirements. A need for more/better toilets, more leisure/entertainment facilities and more clothes shops were also identified by at least 30% of occupiers.

More and better parking has unsurprisingly appeared as the most common answer in all of our surveys throughout the country. More shops in general and clothes shops are also often sited as a suggested improvement.

Some of the other improvements identified by occupiers include less charity shops, increased opening hours of the market, a more attractive square and the introduction of a park and ride initiative. A number of respondents also considered that the town would benefit from a greater number of larger shops and/or a department store.

Town Centre Management

Occupiers were asked how they rated the Council's town centre management activities in Stafford. The responses are as follows:

Activities	**% Respondents**			
	Good	Average	Poor	Don't Know
Promotional Activities and Events	40	43	15	2
Cleanliness	64	26	10	0
Quality of the Public Realm	57	31	12	0
Occupier Involvement/Consultation	14	29	48	9
Local Business Support	0	55	33	12

The table demonstrates that 83% of occupiers feel that promotional activities and events are either good or average. Similarly an overwhelming majority of occupiers rate the cleanliness of the town and the quality of the public realm as good or average.

This compares to other centres where promotional activities, cleanliness and the quality of the public realm have only achieved approximately 30% for the 'Good' category .

Where there is clearly less satisfaction is with existing levels of occupier involvement/consultation and in terms of local business support. In both these cases, the majority of occupiers rated the existing service as only average or poor.

This is a common scenario within all centres we have surveyed. In those centres where there has been no dedicated town centre manager the level of respondents who believe involvement/consultation is poor can rise as high as 95%. In centres with an established town centre manager the response rate has still tended to average 65%.

Occupiers were also asked whether they would like to be more involved in the future management and promotion of Stafford Town Centre. The results showed that 55% of respondents would be interested in becoming more involved, whereas 34% would not.

From our discussions with the town centre manager, it is evident that a programme is currently being developed where smaller business throughout the town will be invited to contribute to future town centre management issues. This compares to the current system, which has 12 members including key retailers such as Boots and W H Smith. Therefore, we believe that such a process will help improve local business involvement and provide a forum for more comprehensive consultation in the future.

General Comments

When asked for their general comments on Stafford town centre, several respondents used the opportunity to reiterate their concerns over car-parking and the lack of larger, prestige stores in the town. It was also a concern of some occupiers that there was inadequate liaison and integration between market management and general town centre management.

As regards, the marketing of Stafford, it was felt by some respondents that too often promotions activity was focused on the main town square when other areas of the town, including the market might benefit from being involved.

6 POPULATION AND EXPENDITURE

6.1 Introduction

In defining the catchment area for this study, it is important to consider the nature of convenience and comparison shopping trips. Trips made to both food and non-food stores are generally undertaken within a limited distance. In addition, Stafford Town Centre's potential catchment is heavily influenced by the proximity of competing centres and out-of-centre retail warehousing. The competing centres include:

Centre	Miles	Drivetime
Hanley	18.7	27 mins
Wolverhampton	15.8	24 mins
Telford	20.0	32 mins
Cannock	9.1	13 mins

Source: AA Autoroute, 1999

Given the proximity and strength of these centres, it is critical to understand current shopping patterns and the potential market share of Stafford Town Centre before any estimate of likely future floorspace can be made. From our knowledge of the competing centres and the likely sphere of influence of the retail facilities currently found within Stafford Town Centre, we believe that Stafford is likely to attract the majority of its shoppers from within 15 to 20 minutes off-peak drive time of the Town Centre.

However, with no historical data available in relation to Stafford's potential catchment, we have purposely 'stretched' the boundary of our Household Survey to cover certain areas outside the primary catchment where there is still uncertainty as to where people within these areas currently shop. These areas are mainly concentrated to the east and west including Rugeley and Uttoxeter and Newport.

The defined catchment adopted has been broken down into postal code zones at a four-digit level (eg ST16). This zoning by post code has enabled us to build up a 'jigsaw' of the different shopping patterns that occur within each post code zone and how this impacts on Stafford's overall market share. The zones that have been included within the defined catchment are as follows:

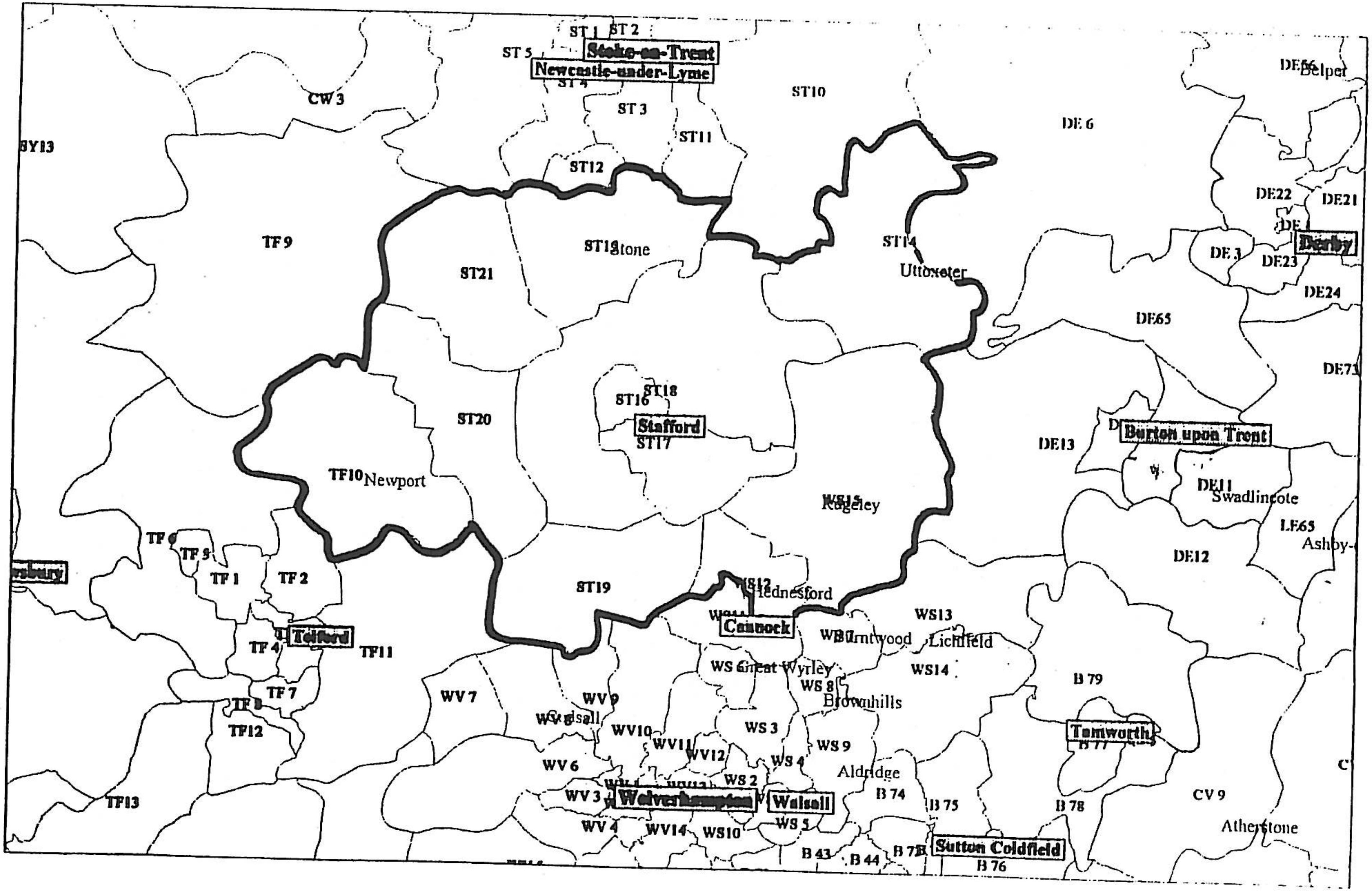
- ST14 - Uttoxeter/Stafford
- ST15 - Stone
- ST16 - Stafford
- ST17 - Stafford
- ST18 - Stafford
- ST19 - Penkridge
- ST20 – Stafford/Newport
- ST21 – Eccleshall/Market Drayton
- TF10 – Newport/Telford
- WS12 - Hednesford/Cannock
- WS15 - Rugeley/Stafford

Clearly, the primary catchment for Stafford will be focused upon postal code zones including ST16, 17 and 18 with the remaining zones looking to various centres including Stafford. In addition, there will also be a certain amount of inflow into Stafford Town Centre from outside the defined catchment for this study. In order to make some form of judgement of the likely levels of inflow from outside the catchment we have examined the results from the Town Centre Survey in relation to the place of residence of each respondent.

6.2 Catchment Population

The population within each postal code zone has been calculated using CACI mapping techniques. CACI estimate population figures based on data from the 1991 Census of Population.

It is then possible to apply local population growth estimates, provided by Staffordshire County Council, to predict the likely change within the catchment population through to the year 2011. Although this report seeks to provide strategic guidance through to 2020 we feel that it is in unreliable to project both population and expenditure beyond the next plan period (2011).



Stafford and surrounding area - Postcode districts

Although the projections for the Stafford Borough area predict that the population between 1991 and 2011 will fall by –0.6% we have been advised by the County Demographer that the estimates for the County as a whole are likely to be more reliable than those for small areas at a district/borough level. In addition, the catchment adopted spans a number of local authority boundaries within Staffordshire. Therefore, the application of growth rates produced for Stafford Borough are not relevant to the whole of the defined catchment.

On this basis, we have applied the County-wide growth rate which is based on the Registrar General's revised final mid-year population estimate for 1991 and incorporate 1996-based data on fertility and mortality from OPCS and the Government Actuary Department.

The 1991 Census of Population estimates that there are currently over 234,200 people within the defined catchment for this study. Using Staffordshire County Council population projections, it is anticipated that by 2011, the catchment will have grown by 2.6% to over 240,200. The table below provides a detailed breakdown of population growth within all 11 zones.

POSTCODE DISTRICT	1999	2001	2006	2011
ST14	18,520	18,598	18,794	18,992
ST15	18,578	18,656	18,853	19,052
ST16	28,282	28,401	28,700	29,003
ST17	40,923	41,095	41,528	41,966
ST18	16,178	16,246	16,417	16,590
ST19	14,485	14,546	14,699	14,854
ST20	7,273	7,304	7,381	7,458
ST21	6,372	6,399	6,466	6,534
TF10	17,363	17,436	17,620	17,806
WS12	30,440	30,568	30,890	31,216
WS15	35,818	35,969	36,348	36,731
Total	**234,232**	**235218**	**237,696**	**240,202**

Source: Staffordshire County Council, 1999

6.3 Retail Expenditure

In order to calculate expenditure on retail goods and commodities within the potential catchment area, we have applied expenditure estimates per head provided by the Unit for Retail Policy Information (URPI) to the population figures from within the eleven zones.

URPI also provides ultra long term growth predictions for convenience, comparison and total expenditure per capita. We have adopted their goods based figures which are estimates for the UK, derived from the ONS Blue Book, UK National Accounts and from special abstracts supplied by the Office for National Statistics. For the purposes of this study we have adopted URPI's most conservative ultra long term figures taken from Brief 99/2.

These growth rates have been applied to our population projection model which has been based on the County Council population forecasts outlined above. Using this model we have produced expenditure estimates for the potential catchment area for 1998, 2001, 2006 and 2011 which take into account both retail expenditure growth and population growth.

Retail Expenditure Growth Within the Defined Catchment

	1999	2001	2006	2011
Convenience	£273.1m	£275.4m	£297.8m	£283.9m
Comparison	£372.4m	£401.5m	£484.1m	£583.9m

Source : Chesterton, 1999

6.4 Convenience Goods Expenditure

Total convenience goods expenditure available within the catchment area has been calculated for 1999, 2001, 2006 and 2011.

The per capita expenditure figures are derived from URPI goods-based estimates of retail convenience expenditure at 1995 prices. These have been adjusted to reflect local circumstances using the ACORN demographic and socio-economic profile produced by CACI for the catchment population. CACI currently estimate that convenience goods expenditure within the catchment is 9% below the national average.

The estimates also take account of special forms of trading such as mail order, vending machines, etc. URPI estimate that special forms of trading for convenience goods account for 0.9% of total spend.

The resulting figures have been projected forward using the ultra long term growth rate for convenience goods which estimates an annual average growth rate of 0.1%.

For the defined catchment, total convenience expenditure is estimated to increase by 2.5% between 1999 and 2006 from £273.1m to £279.8m, with a further 1.5% increase to £283.9m by 2011.

6.5 Comparison Goods Expenditure

Total comparison goods expenditure available within the catchment area has been calculated for 1999, 2001, 2006 and 2011.

The per capita expenditure figures have been adjusted to reflect local circumstances using the ACORN demographic and socio-economic profile produced by CACI for the catchment population. CACI currently estimate that convenience goods expenditure within the catchment is 12% below the national average.

As with convenience goods spending we have used the (URPI) ultra long term growth rates. URPI assume an annual average growth rate of 3.6% for comparison goods spending.

Total comparison expenditure is estimated to increase by 56.8% between 1999 and 2011. This represents a £211.5m increase in 12 years.

6.6 Stafford's Market Share

Having calculated the likely levels of expenditure that are generated by the population living within the defined catchment area, it is now important to model what proportion of this expenditure is currently attracted to Stafford Town Centre as a whole.

The amount of trade that is captured by a particular centre within a defined catchment is often referred to as its 'market share'. Market shares can be estimated by calculating the likely turnover of existing retail properties and then applying this to the money available within the catchment. However, this method relies on a number of assumptions including the likely trading performance of local stores.

Therefore, the most accurate way to estimate the potential market share of a particular centre within a defined catchment is to undertake market research to understand where people within that catchment actually shop. A critical element of this overall study has involved the completion of 750 household interviews within particular postal code zone mentioned above. By analysing the results from the survey it has been possible to understand the likely levels of expenditure that flow into Stafford Town Centre. The estimated market shares for each zone are highlighted below:

POSTCODE DISTRICT	**Convenience Goods (food)**		**Comparison Goods (non-food)**
	Main Shop -%	***Top-up Shop -%***	**%**
ST14	2	0	8
ST15	30	3	30
ST16	94	31	71
ST17	83	27	75
ST18	71	23	70
ST19	30	3	28
ST20	38	14	56
ST21	40	0	58
TF10	0	0	0
WS12	8	3	8
WS15	4	0	18
Total	**39%**	**11%**	**38%**

Source : Chesterton Household Survey 1999

It is evident from the above table, that Stafford's primary catchment is concentrated within the postal code zones of ST16 to 18. The strength of Uttoxeter's provision ensures that very little expenditure from within ST14 comes to Stafford Town Centre. This compares to the zones to the north and south (ST19 and ST15) where Stafford currently draws almost a third of the expenditure from each.

Other important zones for Stafford are ST20 and ST21 where, although shoppers are faced with a number of alternatives including Telford, Stafford still manages to attract almost 60% of expenditure for non-food goods and 40% for food. However, as one moves further west, the sphere of influence of Stafford falls away sharply with the town attracting no expenditure from postal zone TF10 which is focused on Newport.

For postal code zone WS15 which is focused on Rugeley, it is evident that Stafford is more popular as a non-food destination rather than for convenience/food expenditure. In addition, the proximity of Cannock in zone WS12 suggests that only a small proportion of the expenditure within this zone is attracted to Stafford.

However, despite the proximity of competing centres to Stafford it is interesting to note that the town is a popular destination for non-food shopping as it is for convenience goods. Usually the market shares for comparison goods tend to be lower as people are prepared to travel greater distances when shopping for non-food goods. As highlighted previously, this would underline the strength of Stafford as a comparison goods centre within its immediate catchment.

6.7 Inflows of Expenditure

In addition to the level of expenditure that is attracted from within the defined catchment, it is also important to quantify the likely level of expenditure that will also be attracted to the town from shoppers outside the primary catchment. Clearly, by extending the catchment to incorporate areas such as Newport and Utoxeter we have tried to ensure that 'pockets' of potential inflow have been covered.

However, regardless of how far a catchment can be extended, there will always be a number of visitors who have travelled great distances to visit a particular town or city. Towns/cities that tend to benefit from significant levels of inflow include regional centres with a unique retail offer (such as Birmingham and Manchester) and historic towns with a strong tourism market (such as Bridgnorth and Shrewsbury).

To enable us to estimate the likely inflow that occurs within Stafford Town Centre, we have analysed the results from our Town Centre Shopper Survey particularly in relation to where customers live. The survey results demonstrate that 5.1% of the 289 shoppers interviewed live outside the defined catchment. Clearly, this limited level of inflow would confirm issues raised in the Occupier Questionnaire where local traders believed that the majority of their trade relies on local residents rather than visitors and tourists.

Based on our analysis of the visitor survey, we have applied an assumption that Stafford will experience a 5% inflow for both convenience and comparison goods expenditure.

6.8 Forecast Growth In Expenditure Attracted to Stafford.

	Market Share	**Expenditure Available to Stafford Town Centre - £M**			
		1999	**2001**	**2006**	**2011**
Convenience					
Main	39%	78.4	79.1	80.3	81.5
Top up	11%	8.2	8.3	8.4	8.5
All Convenience	*32%*	*86.6*	*87.4*	*88.7*	*90.0*
Inflow	5%	4.3	4.4	4.4	4.5
Total Convenience		**90.9**	**91.8**	**93.1**	**94.5**
Comparison	38%	142.9	154.0	185.8	224.0
5% Inflow		7.2	7.7	9.3	11.2
Total Comparison		**150.1**	**161.7**	**195.1**	**235.2**

Source : Chesterton Household Survey, 1999

With forecast growth in convenience shopping predicted at only 0.1% per annum it is not surprising to discover that Stafford Town Centre will only experience an increase of £3.6m in food expenditure between 1999 and 2011. In comparison, the significant increase in expenditure on non-food goods would suggest that Stafford's 38% market share would see an increase of over £85m, which would be available for new retail facilities in the future.

In order for Stafford to capture this significant growth in comparison goods expenditure it is likely that there will be a need to enhance future retail provision to ensure that this growth is not lost to competing centres and Stafford's future market share does not decline.

However, if an excess of comparison expenditure manifests itself within the defined catchment area, this does not translate directly into a requirement for additional floorspace. It will also be necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns including E-commerce;
- The current capacity and efficiency of retail floorspace within the Town Centre; and
- Future changes in business productivity and current development commitments.

7 RETAIL CAPACITY ASSESSMENT

7.1 Methodology

Retail capacity assessments are an important pre-requisite to any proposed retail development strategy as they provide invaluable information on the levels of demand for additional retail facilities and the likely impact this development will have on established stores within the catchment.

Capacity assessments are also now an excepted method for guiding future allocations for retail development within local plans.

However, it must be stressed that, although capacity assessments are based on factual data, the conclusions must only be treated as a guide/indicator rather than providing unchallangeable evidence. This relates to the complexity of the modelling and the high number of assumptions applied which can be interpreted in a number of different ways.

7.2 Capacity Formula

Expenditure £m - Turnover £m = Surplus/Deficit £m

Expenditure £m - the expenditure element of the above equation is calculated by taking the population figure within the defined catchment and then multiplying this figure by UK average expenditure levels for food spending per annum. The formula is subject to a number of factors which need to be considered to help provide the most accurate figure for that particular local catchment. These include;

- growth in population
- growth in expenditure per head per annum
- special forms of trading (eg catalogue shopping)

Turnover £m - the turnover figure relates to the annual turnover generated by existing retail facilities within the same catchment which has been adopted to calculate the population figure. The turnover of existing facilities is calculated using Retail Rankings which lists turnovers per square metre for all the major retail multiples.

Surplus/Deficit £m - this represents the difference between both the expenditure and turnover figures outlined above. Clearly, a surplus figure will represent an under provision of retail facilities within the catchment which would suggest that additional floorspace is required, whereas a deficit would represent an over provision of retail facilities and in these circumstances it would prove difficult to justify additional floorspace.

Although a surplus figure is represented in £m, it is possible to convert this figure into floorspace using the turnover per square metre figures used to calculate the turnover part of the equation.

7.3 Capacity for Future Convenience Goods

In order to ascertain the likely need for additional convenience goods floorspace within Stafford Town Centre, it is important to understand the true nature of the existing supply. As noted previously, Stafford Town Centre's performance is underpinned by having three major supermarkets within or on the edge of the existing town centre. Faced with considerable pressure for out-of-centre foodstore development in the past, Stafford now finds itself in a somewhat unique position, which provides considerable benefits through linked trips.

Many commentators will argue that, regardless of where a foodstore is located, shoppers will treat such a facility as a single destination and therefore it has limited benefits for surrounding facilities. Clearly, from the evidence gathered in the household survey, it can be seen that for both Sainsbury and Tesco, 43% and 39% of shoppers undertake a linked trip with other facilities in the town after completing their main food shopping trip. Even Asda, which is located on the other side of the Queensway to the town centre, still manages to achieve a figure of 26%. This underlines the importance of these key anchors for Stafford Town Centre and demonstrates how major foodstores can underpin a town centre's economic strength.

A critical issue for the overall strategy is to ensure that this position is not threatened by future proposals for major foodstores that will provide no opportunities for linked trips to the existing retail core.

The following table details the key food operators within and on the edge of the Town Centre which together perform an important anchor role for the town centre. The extent of the town centre's current convenience goods supply is as follows:

Store	Gross SQM	Net SQM
Tesco	5,181	2,549
Sainsbury	4,981	2,598
Asda	7,574	4,182
Iceland	897	530
Other (includes M&S foodstore)	1,227	736
Total	**19,861**	**10,594**

Source: Chesterton, Stafford District Council, GOAD, 1999

When benchmark company turnover to floorspace ratios are applied to the net floorspace figures for the existing retail facilities within Stafford Town Centre, this provides an estimate of the current retail business expenditure generated within the catchment. We have calculated the expected turnover of these facilities by applying figures relating to company benchmark floorspace to turnover ratios as shown below.

Store	Gross SQM	Net SQM	Turnover Per SQM*	Total Turnover
Tesco	5,181	2,549	£9,628	£24.5m
Sainsbury	4,981	2,598	£9,624	£25.0m
Asda	7,574	4,182	£8,007	£33.5m
Iceland	897	583	£4,373	£2.6m
Other	1,227	798	£4,250	£3.4m
Total	**19,861**	**10,594**		**£89.0m**

Source: Chesterton, Stafford District Council, GOAD, 1999

**these are figures taken from retail rankings and adjusted to 1995 prices. There has also been a reduction for petrol sales and VAT where applicable.*

7.4 Future Convenience Floorspace Requirements

Our analysis of Stafford Town Centre's market share of convenience goods expenditure within the defined catchment identified in the previous Section, indicates that in 1999 approximately £90.9m is estimated to be available to convenience goods stores within Stafford Town Centre. When we compare this estimate with the total turnover generated by existing retail facilities based on company averages, it can be seen that the current provision is broadly in balance with a difference of +£1.9m.

Clearly, this additional expenditure will either be passing through existing shops which are trading slightly above company averages, or the other smaller convenience stores, who do not publish turnover figures, may be performing better than we have estimated.

In addition, it can be seen from the survey evidence that certain stores will be trading better than others. The out dated format of the current Tesco store with its multi-storey car park is beginning to suffer from the store's inflexibility and inability to meet modern customers' convenience shopping needs. Therefore it is not surprising to discover that both Asda and Sainsbury prove more popular destinations with adequate surface level car parking and ease of access.

We therefore believe that the current Tesco is under-performing in relation to average company turnover estimates. Recognising their somewhat compromised position, it is likely in the future that Tesco will look to re-locate within the town where they can operate from more modern/flexible premises.

If Tesco manage to secure a suitable site within or on the edge of the town centre then, a modern store of a similar size to their exiting store will perform significantly better in terms of total turnover. This will help claw back trade currently lost to Sainsbury's and Asda which will absorb any over trading that currently exists as a result of Tesco's weakening market share.

If Tesco do relocate to new premises, we believe that the balance of supply and demand will then reach a state of equilibrium. In terms of convenience goods expenditure growth, it is anticipated that even by 2011 there will only be an increase of £3.6m based on Stafford's current market.

As it is unlikely that Stafford will significantly increase its market share for food sales in the future (especially in relation to proposed increases in supply at Rugeley, Cannock and Hednesford), it is evident that there will be limited demand for new convenience goods floorspace throughout the next plan period.

In addition, the proposed development of the Lidl foodstore at the former Stafford General Infirmary is likely to absorb a significant proportion of the projected growth through the next plan period.

Therefore, despite the uncertainty over the future of Tesco's operations within the town, there is unlikely to be sufficient growth of convenience goods expenditure through to 2011 to support significant additional convenience floorspace within Stafford.

7.5 Capacity for Future Comparison Goods

As our general standard of living increases our ability to spend more money on non-food goods such as clothing and footwear will also increase. The current ultra-long term growth rate provided by URPI suggests that this growth is likely to be 3.6% per annum. Clearly, over any 10 year plan period this represents a significant increase in total non-food expenditure.

However, although non-food shopping is often seen as a leisure/social activity, there are increasing pressures being placed upon the traditional high street function not only from major out-of-centre retail facilities but also from new forms of shopping which have no need for a traditional town centre or shop unit.

Although we have accounted for special forms of trading within our expenditure analysis, we feel that because we are forecasting up to 2011 it is important that we do not ignore the rapidly expanding opportunities of retailing on the World Wide Web currently known as 'E-commerce' or 'E-tailing'.

As this is still very much a new and emerging form of retailing the likely impact of such technology is still somewhat unknown. According to retail analysts Verdict, on-line sales are set to rise to 3% of all sales by 2004. Although this is a significant amount of money in real terms, we feel these forecast levels are unlikely to dramatically reduce the demand for traditional retail space especially in the short to medium term (i.e. up to the year 2011). However, in order to allow for the inevitable growth in Internet sales, we have removed 5% of the forecast expenditure increase to allow for this.

7.6 Bulky Goods/Retail Warehousing

In terms of 'bulky goods', which are increasingly sold from retail warehouse facilities, URPI estimate that expenditure on such goods currently accounts for 32% of all non-food expenditure. This is broken down as follows:

Type of Goods	% of Total Comparison Goods Spending 1998
Electrical	15
Furniture/carpets	8
DIY	9
Total 'bulky Goods'	**32%**

Source : URPI Brief 98/2, 1998

If we apply this percentage to the £150.1m that is available to non-food goods facilities within Stafford then this would suggest that approximately £48.0m could be available to retail warehouse operations within Stafford. However, similar to the situation with food retailing, Stafford has managed to avoid (whether deliberately or incidentally) significant retail warehousing development which dominates much of the non-food shopping in other towns and cities.

Therefore, when examining the existing provision, which is concentrated in two locations at Greyfriars and The Queens retail parks, we believe that it is unlikely that such facilities will absorb 32% of the total non-food expenditure in Stafford. Clearly, with only one electrical retailer located at Queens Retail Park, it would suggest that would suggest that a significant proportion of the

14% of sales that these goods account for, are more likely to be bought from existing electrical shops in the town. This is not surprising when you examine the range of electrical goods retailers present within the town centre including Currys, Rowneys Home Entertainment, Capital Domestic Appliances, Dixons, The Co-op and Roy Townsend.

In addition, there are also a number of furniture stores present within the town, which are more often located on major out-of-centre retail warehouse parks. Operators such as Courts, The Co-op and Walmsleys Suite Superstore clearly add vitality by providing uses, which in many other towns have since been forced to out-of-centre locations.

Therefore, in order to estimate the likely demand for non-food retail warehousing within Stafford through to 2011 we have firstly estimated the turnover of the current schemes by applying company benchmark sales densities as follows:

	Gross Floorspace	Net Floorspace	Benchmark Turnover Per SQM*	Total Turnover - £M*
Queens Retail Park				
Petsmart	930	790	£950	0.75
Select House	930	790	£1,580	1.25
Carpet World	930	790	£1,260	0.99
Matalan	1,860	1,580	£2,280	3.60
Dunelm Mill Shop	1,766	1,501	£1,390	2.09
Poundstretcher	930	790	£1,640	1.30
Powerhouse	930	790	£5,370	4.24
B&Q	3,253	2,765	£1,600	4.44
Greyfriars Retail Park				
Carpetright	930	790	£1,200	0.95
Focus DIY	4,647	3,950	£1,010	3.99
Halfords	1,208	1,027	£1,745	1.79
Harveys	930	790	£1,450	1.15
Homestyle	930	790	£1,640	1.30
MFI	3,420	2,907	£2,340	6.80
Magnet	717	609	£2,020	1.23
Total	**24,311**	**20,659**		**35.87**

Source : Retail Rankings 1999 & Chesterton 1999

**Both turnover figures quoted have been readjusted to reflect VAT and the 1995 Price Base*

Based on our evaluation of the likely turnover of Stafford's current retail warehouse provision, we estimate that this currently represents 24% of Stafford's total non-food expenditure (i.e. 35.87/150.1x100=23.9).

We have modelled future demand for retail warehousing using a 24% market share. Therefore, if we role forward this 24% share (or £35.9m) and allow for increased productivity and special forms of trading, the likely expenditure available for retail warehousing floorspace will be as follows.

	Turnover + Increased Productivity - £M	Expenditure Available - £M	Surplus Expenditure - £M	5% Reduction for E-commerce - £M	Surplus for Additional Floorspace - £M
1999	35.9	35.9	-	-	-
2001	36.6	38.8	2.2	0.11	2.09
2006	38.5	46.8	8.3	0.42	7.88
2011	40.5	56.4	15.9	0.80	15.82

Source: Chesterton 1999 at 1995 Prices

If we apply an average sales density for retail warehousing to the surplus expenditure, we estimate that by the year 2011 there will be a requirement for approximately 9,450 sqm gross at the current market share.

	Surplus Expenditure	Average Sales Density + Increases in productivity	Net floorspace Requirement	Gross Floorspace Requirement
1999	-	1,750	-	-
2001	2.09	1,785	1,170	1,380
2006	7.88	1,875	4,200	4,940
2011	15.82	1,970	8,030	9,450

Source: Chesterton 1999 at 1995 Prices

7.7 Future Proposals for Non-food Bulky Goods Floorspace

In terms of future supply, we are aware that an additional retail warehouse scheme is currently being developed at the now redundant Stafford General Infirmary which will involve the construction of 8,300 sqm gross of retail warehousing potentially split into six units plus a Lidl foodstore. If we compare the size of this scheme with the likely growth that will be achieved in bulky goods expenditure in Stafford, it appears that this scheme (when fully operational) will absorb the majority of the surplus capacity available through to 2011.

This does not suggest that no further out-of-centre retail warehouses should be considered over the medium to long term. With retail warehousing currently representing approximately 24% of Stafford's total non-food expenditure there may be scope to increase this share.

However, any future proposal will have to be carefully considered in the light of the fact that there appears to be limited leakage from Stafford's primary catchment to retail warehouse facilities elsewhere. Therefore, the likely impact on existing town centre facilities could prove detrimental, depending on the range of goods that will be sold.

In terms of retail warehouse parks, PPG6 accepts that they may often provide large showrooms that cannot easily be accommodated within established town centres and that such developments fulfil a role within the modern day shopping hierarchy where convenience and price are more important than packaging and presentation. Since PPG6 began to control the effects of out-of-centre schemes, retail warehouse developments have evolved to serve a particular sector of the market, which concentrates on the sale of 'bulky' goods. Planning conditions have been introduced to ensure that future out-of-centre developments continue to perform such a role without having a detrimental impact on established town centres.

From our experience, any retail warehouse scheme that operates within these parameters, satisfying demand for bulky goods rather than comparison goods normally found in established town centres, can be beneficial to the strengthening of the retail hierarchy.

7.8 Town Centre Comparison Floorspace

With such a diverse range of both multiple and independent comparison goods retailers, it is more difficult to estimate the likely 'benchmark' turnover of each facility. Therefore, the most accurate way to estimate the turnover of the existing retail facilities is to divide the Stafford's current share of non-food retail expenditure by the current level of facilities within the town.

From our analysis of the market share of Stafford Town Centre, we estimate that the current level of trade passing through town centre non-food facilities (which excludes retail warehousing outlined above) is £114.2m. This includes 5% inflow from outside the defined catchment, based on the town centre survey analysis.

Based on existing GOAD data, it is estimated that there is currently 377,900 sq ft or 35,120 sqm of comparison goods floorspace. As GOAD analysis is based on building footprint, which excludes upper floors, it is evident that these figures represent neither gross nor net floorspace. However, in order to ensure that we have taken account of potential rear storage, we have reduced the overall GOAD figure by 30% to provide an estimated net floorspace figure of 24,584 sqm (264,530 sq ft).

If we apply this floorspace to the current expenditure available to Stafford Town Centre, we estimate that the current turnover per sqm is approximately £4,645.

Similar to the situation with food retailing within Stafford, it is unlikely that Stafford can significantly increase its current market share for non-food goods within the defined catchment. On this basis, we have rolled forward Stafford's existing market share to examine the likely floorspace requirements to maintain this position.

From the modelling outlined in the previous section, we have forecast that between 1999 and 2011, an additional £85.1m will be available for non-food shopping. Clearly, if no additional comparison goods floorspace was developed within the period up to 2011 then, regardless of improved productivity by existing facilities, the majority of this surplus could be lost to competing centres identified previously. In addition, Stafford's market share could then fall from its current 38% to under 25% which would significantly change the future shopping and trading patterns within the defined catchment at the expense of the future vitality and viability of Stafford Town Centre.

From our assessment of the current vitality and viability of the existing town centre it is evident that Stafford is well represented by multiple high street retailers in relation to the centre's size and catchment. As a consequence, it is unlikely that the Town Centre will attract significant additional town centre multiples to increase the existing levels of comparison goods turnover to fulfil the capacity requirements up to 2011.

From the multiple retailers we have contacted as part of this study who are currently not present within Stafford, it is evident that a large proportion have either a presence in Wolverhampton, Telford or Hanley which they feel adequately covers the Stafford catchment. Therefore, they are unlikely to locate in Stafford especially if this will then also have an impact upon their existing stores elsewhere.

However, interest has been expressed from major retailers including department store operators who may consider locating in Stafford if a suitable site or scheme was provided. Therefore, despite limited demand from major national multiples, we believe that there will be a direct requirement for non-food retail development within Stafford Town centre up to 2011. The actual level of this additional requirement will be subject to a number of factors including;

- changes in competing supply;
- current outstanding permissions;
- increased productivity,
- market demand; and
- the advent of E-commerce.

By allowing for both increased productivity and the emerging growth in 'E-tailing' we have estimated below the likely expenditure that will be available for new comparison goods floorspace by 2011.

	Turnover + Increased Productivity	Expenditure Available	Surplus Expenditure	5% Reduction for E-commerce	Surplus for Additional Floorspace
1999	114.2	114.2	-	-	-
2001	116.5	122.9	6.4	0.32	6.08
2006	122.4	148.3	25.9	1.30	24.60
2011	128.7	178.8	50.1	2.51	47.59

	Surplus Expenditure	Average Sales Density + Increases in productivity	Net floorspace Requirement	Gross Floorspace Requirement
1999	-	4,645	-	-
2001	6.08	4,740	1,280	1,700
2006	24.60	4,980	4,940	6,580
2011	47.59	5,235	9,090	12,090

If we apply an average sales density for town centre retail facilities to the surplus expenditure, we estimate that by the year 2011 there will be a requirement for approximately 12,000 sqm gross to retain its current market share.

7.9 Requirement for Future Comparison Goods Floorspace

It must be noted that although the need for potentially up to 12,000 sqm gross may appear to be a significant amount of additional retail floorspace, this capacity accounts for a period up to 2011. If we were to break down the additional capacity on an annual basis then this would only represent 1,000 sqm gross per annum. Clearly, we accept that retail development cannot be provided on a 'drip-feed' basis and therefore there will be times throughout the period to 2011 when imbalances may occur.

However, it must be clear that any strengthening of Stafford's future role and provision must be done on a sensitive and incremental basis which will enable the town to maintain and possibly enhance its current status without damaging existing multiple, or more importantly, indigenous independent retailers. Any future strategy, which will enable Stafford to continue to operate effectively over the next 20 years, must seek to avoid significant influxes of retail floorspace which are insensitive to the finely balanced supply and demand scenario that currently exists within the town.

What is also critical is the fact that the potential capacity identified above can be accommodated and absorbed within the existing town centre boundary. Over the longer term it may be necessary to begin to break through into areas beyond the current town centre and examine ways of overcoming the restrictive nature of the Queensway. However, for the short to medium term, the focus for new comparison goods retail provision must be primarily targeted within the existing town centre.

As discussed in Chapter 10 of this report, apart from the Tipping Street site there are no readily developable sites located within the town, which could accommodate further provision. We have identified a number of additional opportunities which we believe have the ability to absorb the predicted future growth. However, considerable time and effort will be required in order for these opportunities to be realised.

7.10 Future Proposals for Comparison Goods Floorspace

From our consultations with both local officers and agents/developers we can confirm that there are currently no major proposals for significant comparison goods development within Stafford Town Centre which will influence the overall recommended strategic guidance.

We have previously addressed the redevelopment of the Stafford General Infirmary within the 'bulky goods' section outlined above.

However, as the study has developed, we have been made aware of proposals for the future redevelopment and refurbishment of the former St George's Hospital as a key tourist attraction pioneered by the Food Heritage Trust.

Clearly, we believe that the Council should welcome any potential opportunity to enhance the tourist appeal of Stafford with the development of a major attraction with national appeal and profile. However, a recent schedule, which highlights the likely levels of floorspace within the development, has identified over 9,633 sqm of retail floorspace within the total 36,400 sqm development.

We accept that major tourist attractions, such as the proposal for St George's Hospital, will require a certain element of retail floorspace which is usually targeted towards specialist retail goods. However, we are very concerned at the scale of the proposed retail element, which exceeds our normal expectations of what could be considered ancillary for a tourist attraction of this nature.

As highlighted in Section 7 of this report, the total capacity available for additional non-food goods within Stafford through to 2011 is 12,000 sqm. We acknowledge that the proposed specialist retailing will be provided to attract additional spend from tourists rather than the local population. However, the scale of the proposed retail element would have to attract a significant number of new visitors (possibly in excess of 1 to 1.5 million per annum).

In addition, the location of St George's Hospital does not lend itself to the facilitation of additional linked trips to the existing Town Centre. It is, in PPG6 terms, an out-of-centre location. This suggests that the potential 'spin-off' benefits for the existing economy will be limited.

Therefore, we recommend that the Council must carefully monitor the proposed retail element of the scheme and how this floorspace will be ultimately utilised. If there is any suggestion that units will be operated by retailers that could be accommodated within traditional town centre units, then we believe that the proposed retail element of the development could have a detrimental impact on the future of Stafford Town Centre and could jeopardise the implementation of the potential opportunities outlined in Section 10 of this report.

8 FUTURE TRENDS

8.1 Other Retail Trends

As highlighted above, the continuation of growth in consumer expenditure is likely to result in the need for additional retail floorspace in the medium to long term. With the proposed development of a replacement Tesco foodstore and the retail warehouse park currently under construction at the former Stafford General Infirmary, it is likely that any future growth in retail floorspace should primarily be focused upon town centre comparison goods facilities.

At present we believe that Stafford's current supply is broadly in balance with consumer demand. Feedback from investors and commercial agents suggests that demand for town centre retail premises is sufficient to ensure that there is a healthy turnover of premises and a stabilisation of the overall vacancy rates. Therefore, it is unlikely that significant demand for additional town centre floorspace will emerge in the short term.

Nevertheless, there are other trends that may influence the need for space in the town. In particular, the changing operational requirements of commercial occupiers, which can create opportunities for new development or the restructuring of existing accommodation.

The comparison retail sector grew rapidly during the late 1980's. Since the latest recession the sector has continued to grow, but not at the same rate experienced before the recession. However, demand for new units amongst retailers remains buoyant across the Country. As discussed previously, home shopping and electronic commerce (sales on the Internet) has not yet had the impact expected and is unlikely to affect the overall demand for retail floorspace through to 2011.

Indicators suggest that larger regional centres have out-performed smaller centres. As a result major centres such as Birmingham and Hanley have become stronger whilst lower order centres such as Stafford have only experienced modest growth. Therefore, the bulk of demand for new shops amongst multiple retailers has been concentrated within large shopping centres.

Nevertheless, lower order town centres have attracted some interest from multiple retailers. In particular, new specialist retailers have emerged during the last few years, and have generated new demand for premises in towns of all sizes. For example the comparison discount sector has emerged, with the growth of clothing retailers such as TK Maxx and Peacocks, who have expanded in high street locations.

The expansion of out-of-town schemes has slowed, partly due to government controls. Consequently, the shift towards town centres has increased demand for large modern units within the high street. Multiple retailers are now looking for flexible units over 220 sq m net within the town centre which clearly favours more modern units within any particular town.

8.2 Published Retail Operator Space Requirements

Multiple retailers' space requirements are often published. This information can provide a reasonable indication of the potential level of demand within specific towns. Potential retailer demand within Stafford Town Centre has been examined and compared with other major competing centres. Published requirements since 1994 are summarised below.

Multiple Retailer Requirements

Centre	Number of Requirements						
	1994	1995	1996	1997	1998	1999	Rank
Stafford	22	30	34	32	38	50	110th
Stoke-on-Trent	13	25	35	36	35	36	161th
Wolverhampton	41	54	61	64	69	69	56th
Telford	-	52	48	51	53	52	105th
Cannock	15	17	11	12	11	18	246th

Source: Retail Focus 1998

The information above reflects Stafford's relative position within the retail hierarchy. During the past 6 years, Stafford's number of multiple operators requirements have increased significantly from 22 to 50.

With retail development beginning to recover after the recession in 1993, it is not unusual to expect that retailer's requirements would increase in correlation with improved market conditions. However, the 127% increase experienced by Stafford appears to outstrip other centres, albeit from a very low base.

What is also surprising is that Stafford appears to have a similar level of occupier demand to Telford, although Telford appears to attract a stable level of demand compared to Stafford's recent success. Even Wolverhampton, which clearly is a strong sub-regional centre, only has 19 more requirements in 1999 than Stafford.

A selection of the current retailers who have an interest in Stafford include:

- Benson Shoes
- BHS
- Blockbuster Video
- The Carphone Warehouse
- Dunnes Stores
- Fired Earth
- Homebase
- Republic Mans Wear
- Salisburys
- Sports Connection
- T J Hughes

This level of demand underlines the true strength of Stafford's retail core and the future potential for retail development that could accommodate many of these requirements.

8.3 Commercial Leisure Trends

The commercial leisure sector has undergone a significant change in the last decade. During the late 1980s there was considerable development activity in the leisure sector particularly health clubs, golf courses/driving ranges, sports clubs and leisure complexes. This activity was somewhat curtailed with the onset of the recession in the early 1990s, which prompted national leisure operators to take a more cautious approach to their activities.

Despite this trend, over the past few years there has been a renewed interest in leisure orientated developments. Leisure has now become an important part of the British lifestyle despite a recent European Commission report, which found that the UK work the longest hours in Europe. According to the Annual Family Expenditure Survey, the average family spending on leisure (which includes going to the cinema and theatre, sport and hobbies) has risen to £45.80 per week, just behind the two necessities, food (£52.90) and housing (£48.20).

New types of leisure development have emerged and operators have adapted to changing consumer demand, and have developed new ideas. Increasingly, leisure facilities have become more sophisticated, for example virtual reality and quasar centres, multiplex cinemas and multi-use leisure complexes.

In general, major leisure developments draw the majority of their trade from residents within a 20 minute drive time and require a large catchment population. For example, a key requirement of an 8 to 10 screen multiplex cinema is to have an available catchment of approximately 250,000 people within 20 to 30 minutes. Clearly, Stafford has (potentially) a large catchment population of over 580,000 within 30 minutes, although the proximity of major competing centres will limit the potential of the town to attract major commercial leisure operators.

Despite the proximity of competing cinemas elsewhere, we believe that the current population and demand within Stafford could support a multiplex cinema within the town. However, as the multiplex market steadily approaches 'saturation point', we would judge that the number of operators interested in pursuing a scheme in Stafford would be limited. This is also likely to limit the number of screens that could be provided to between six and eight.

Stafford currently finds itself in a fairly strong position, boasting several major leisure attractions all within and close to the town centre. These include:

- The Gatehouse Theatre (570 seats);
- The Apollo Cinema;
- Gala Bingo (Queens Retail Park);
- Sports Arena (Queens Retail Park); and
- SuperBowl Ten Pin Bowling (Greyfriars)

The evening economy is an important economic driver in the future development of town centres. Many centres are still recovering from the effects of major out-of-town leisure complexes, which have caused many traditional town centre cinemas and bingo halls to close.

Clearly, Stafford has managed to retain its town centre cinema, which still proves a popular destination for its catchment, despite multiplex developments at Walsall, Telford and Stoke. Stafford should seek to build on these key strengths by allowing for the diversification of its town centre property base to accommodate new leisure facilities, which complement existing uses to enable visitors to stay longer within the town centre. These uses may include restaurants, themed pubs/bars, cafes, health and fitness clubs and visitor attractions.

From our commercial experience of the leisure market, we believe that the following uses represent realistic future opportunities with particular relevance to Stafford Town Centre.

Bars and Themed Restaurants

A number of bar/pub operators have grown significantly over the last few years, such as JD Wetherspoons, Hogs Head, O'Neills and All Bar One chains. These operators provide modern bars and informal eating premises which cater for shoppers and office workers in the daytime and fashionable customers in the evening.

These outlets require a minimum local catchment population of 50,000 and are usually located on the main streets or in secondary positions close to prime retail, commercial and other leisure uses. These types of outlet have already opened in Stafford, including Wetherspoons on Bridge Street, The Hogs Head on Victoria Square, Bella Pasta on Greengate Street and Pizza Express which is currently being 'fitted out' at Market Square.

Clearly, critical mass will be an important element of future development within Stafford. As the southern quarter of the town centre becomes the focus for A3 uses, based around the proposed leisure development at Newport Road and Friars Walk, other operators may be attracted.

Themed restaurants have also expanded rapidly in recent years such as TGI Fridays, Café Rouge and Bella Pasta. These operators have located on retail and leisure parks and within good secondary and primary high street locations. Town centre restaurants usually require large units of over 200 sq m. Certain types of restaurant can be accommodated in older character buildings, which may become available within the town.

According to the current leisure requirements for Stafford Town Centre the following operators are interested in establishing a presence within the town including:

- Bass Taverns Ltd (including Vintage Inns and Harvester Restaurants);
- Bar Med;
- Whitbread (Bushwackers Original);
- Hustler American Pool (X S Leisure);
- Litten Tree Public Houses; and
- Metro Café Bar.

The attraction of such end users will depend very much upon the types of units available and whether there is the opportunity to consolidate a number of units to provide the space required. There may be a number of opportunities to accommodate such end occupiers if the potential mixed use scheme on land at Friar's Walk is pursued in the short to medium term. Such a scheme could act as a catalyst, which could potentially establish the southern quarter of the town as a leisure-focused quarter.

From our appraisal of the Town Centre, we believe that the southern end of the town offers the greatest potential to secure the critical mass that the majority of modern leisure operators require for their continued success. Clearly, retail demand within this part of the town is now limited and there are some important leisure uses (including the Apollo Cinema and the Coliseum nightclub) which currently anchor this part of the town.

There are other locations throughout the town, which will also prove attractive to potential A3/leisure uses including Market Street, Salter Street, and Mill Street. Opportunities within these areas are more likely to be focused upon café bars, pubs and restaurant facilities rather than leisure uses that require significant amounts of floorspace.

Night Clubs

Large night clubs (capacity over 1,000) have been developed on one hectare sites (including parking), often as part of a larger leisure park. These facilities need to be located in towns with a catchment population of over 100,000 people. Stafford currently has a number of nightclub facilities with the most popular club known as the Coliseum, which is located in the southern sector of the town on the Newport Road.

A recent application for a nightclub was turned down at the existing Allied Carpets unit on Bridge Street, which demonstrates that there is likely demand for additional nightclub facilities within the town. Again the southern sector of the town would be an ideal location for such a facility.

Private Health and Fitness Clubs

Leisure and sports centres have undergone radical changes over the past five years through acquisitions, and the activities of a number of the major operators, including Livingwell, LA Fitness and David Lloyd Leisure (now part of Whitbread). Over this period many traditional public leisure centres have changed to become health and fitness clubs with associated facilities, including bars, restaurant and conference/entertainment facilities.

Private member health and fitness clubs usually contain a range of activities including gymnasium equipment, swimming pool and aerobics studio. There has been considerable growth in the ownership and development of health clubs by the private sector. Large clubs require standalone units of 3,000 to 6,000 sq m and parking for 250 to 300 cars. As a result they have generally located on out-of-centre or edge-of-town centre sites.

In addition, private facilities are usually linked to large concentrations of office development benefiting from the large number of office employees. However, despite Stafford's limited town centre office population, there have been a number of interest's expressed recently such uses and these should be encouraged where possible.

Hotels

Presently the UK hotel industry is enjoying boom conditions. Occupancy figures are now at record levels around the country and hoteliers are beginning to push up rates. UK hotel profits rose by 20% and annual room occupancies increased to a record 75.6% in 1997. The previous peak in hotel occupancy was in 1989, which saw levels at 68.1%.

These buoyant conditions have been helped by increased economic confidence, which has strengthened demand from business conferences and training programmes, coupled with the lack of significant hotel development throughout the 1990's, which has constrained supply.

The corporate groups who are buying up previously private hotels, or building new properties are absorbing most of this new growth. Many independent mid-market hotels are being squeezed at both ends by corporate luxury hotels and by budget-style chains.

The soaring business for hotels is all part of a major cultural change in the UK. The increased spending on leisure is not just causing hotels to boom but also health clubs, family entertainment, restaurants and pubs.

Although current hotel provision is focused close major road networks to take advantage of passing trade, there could be an opportunity for a small hotel development within or close to the centre of Stafford that would enable the town to build upon its current limited tourism base.

Although there are a number of small local run hotels throughout the town including the Swan Hotel on Greengate Street, there could be the potential to attract a 'travel inn' type development to enable the town's image as a tourist destination to be strengthened in the future.

8.4 Residential

With the publication of Revised PPG6 (June 1996) and Central Government's targets for housing development on brownfield land, there has been continued pressure to encourage people to consider living in town and city centres. This opportunity has been given further impetus by the Revision of PPG3 (published March 2000) which seeks to re-introduce housing to town centres by converting space above shops and vacant commercial buildings and including housing in mixed use developments.

Some developers now accept that residential development can provide an alternative use for the large stock of redundant office blocks found within many towns and cities. To date, such conversions have been focused on apartments and 'loft' style premises rather than family housing.

The market for apartments is often dominated by high earning, often single professionals or childless couples who either wish to live in the town centre on a permanent basis, or alternatively, are able to afford two homes. Many properties are bought for investment purposes by individuals and then rented.

The attractiveness of a town centre for residential development or conversion will increase, as the centre becomes more vibrant and diverse. Clearly, the development of a strong evening economy and office employment base is important to stimulating the overall attractiveness of living in a town centre.

Although Stafford has a limited office employment sector within the town, current evidence as to the importance of this market for the conversion of previously redundant buildings can be found in Eastgate Street where a housing association is seeking planning permission for the conversion of the former telephone exchange.

Although affordable housing will be a key driver in Stafford Town Centre because of its limited town centre employment base, opportunities for private residential accommodation should not be ruled out, especially new build.

In addition, opportunities for 'Living Over The Shops' should be investigated, with office rents above shops falling to as low as £45 per sqm, private accommodation may prove a more viable alternative. The opportunity for residential accommodation above retail premises could be investigated in conjunction with a housing association or local university to help address both potential affordable and student housing requirements.

However, a number of important constraints could affect the delivery of residential development within Stafford Town Centre and will need to be considered as part of the wider strategy. These could include:

- Many property owners are sitting on 'hope value' waiting for improvements in the office market and the achievement of higher commercial values;

- Some owners/landlords may be reluctant to release premises for conversion;

- A limited choice of larger sites, which are preferred by housing developers;

- Owners of commercial property are reluctant to allow residential development and short-term tenancies above their property, due to existing perceptions of town centre living and security.

In addition, it is difficult to achieve a balanced portfolio of residential accommodation within the town centre and the inevitability of the market becoming polarised between affordable housing developments and high-end properties for sale, which could be a concern.

8.5 Office Trends

Unsurprisingly, Stafford Town Centre's office market is dominated by the public sector, although re-organisation within the County Council has reduced their operational need for town centre office accommodation.

The majority of the current office stock within Stafford Town Centre (both private and public sector) is somewhat dated in its format and in need of significant refurbishment works. Many investors and landlords are currently reluctant to invest the considerable levels of capital required without the security of significant pre-lets.

Clearly, there is a market for more 'cost sensitive' end operators whose priorities relate more to price and flexibility of lease agreements rather than the prestige of quality accommodation.

Our consultations with local developers and agents have confirmed that there is steady demand for town centre office accommodation but this is unlikely reach proportions that will place undue pressure on the existing stock. Therefore, it is unlikely that any new-build will occur during the short to medium term especially with new development at Greyfriars absorbing significant demand for modern accommodation.

8.6 Responding to Future Trends

The market trends presented in this section provide a 'snap shot' of national and local circumstances. In the longer term, demand for commercial premises may be influenced by unforeseen changes. As a result it will be necessary to monitor emerging trends. The overall strategy for Stafford should be flexible, but realistic, and should have the ability to respond to these changes.

In the past demand for retail and leisure facilities has grown steadily (in terms of both consumer and occupier demand). If this trend continues in the future there may be scope for expansion of facilities, certainly in the long term. If the Council wish to ensure that Stafford can respond to any long-term growth it will be necessary to plan for this growth now.

In addition to these trends, the retail and service sector is constantly changing, with new operators entering the market. The leisure and entertainment sector has also experienced some rapid changes. These changes can be difficult to predict, but it is possible to provide the required level of flexibility to ensure that emerging opportunities are not missed.

The emerging recommendations for Stafford will need to bear in mind future uncertainties and risks, and should be in a position to respond to opportunities that arise.

9 KEY PLAYER FEEDBACK

9.1 Introduction

To inform the study, discussions were undertaken with a number of key players including retailers, commercial agents, investors, council officers and other interested parties.

Views were ascertained on the buoyancy of the commercial property market in Stafford Town Centre and its attractiveness to potential investors. General opinions were also sought on the strengths and weaknesses of the town and any suggestions for improvements.

The feedback from these discussions is summarised in the following section.

9.2 Feedback from Commercial Agents

Commercial agents with responsibilities for both office and retail property in Staffordshire were surveyed. A summary of the key messages is set out below.

Office Market

- There is relatively strong demand from occupiers whose priorities are more 'cost sensitive' compared to other factors such as accessibility and the overall quality of accommodation;

- Many investors and landlords are reluctant to provide the necessary capital to bring accommodation up to modern standards, especially redundant office space above retail units;

- Stafford has a relatively steady turnover of occupiers with many end users looking for small amounts of space on short/flexible leases;

- Previous vacant office blocks are beginning to see improved demand with buildings such as Britannia House attracting a number of new tenants;

- It is unlikely that any new speculative office development will be provided by developers who are now looking for significant pre-lets before committing to a particular scheme;

- Concerns exist regarding the limited availability and expense of car parking in the town, both for office employees who require long-stay facilities and for members of the public visiting offices (for professional services etc) who may only require short-stay provision;

- The office market in Stafford is unlikely to compete effectively with nearby out of town office developments such as Greyfriars. Here, the premises are modern, the site is easily accessible and there is ample free car-parking.

Retail Market

- The main focus for retail activity in Stafford Town Centre is at the Guildhall Centre and approximately 75-100 metres in either direction up Gaolgate St and Greengate St. Within this core, it is considered that the demand by retail occupiers is good, with turnover of occupiers low and few vacancies.

- Outside the main core however, the units are considered to be secondary, with demand considerably less and vacancies more common. The view was expressed that these areas, outside the main core were likely to decline in future years with a detrimental effect on the viability and vitality of the town as a whole.

- In some secondary areas of the town, such as at the Sheridan Centre we are advised that there continue to be a number of voids at any given point in time.

- It was also felt that the market hall area, at the back of the Guildhall centre was particularly vulnerable and that this would benefit from the introduction of a main anchor store, such as TJ Hughes or BHS. (The only

BHS in the town has been a temporary Christmas store which has now ceased trading). The Market Square itself was referred to as a 'desert'.

9.3 Feedback from Operators not Present in Stafford Town Centre

The survey work undertaken in Stafford town centre has revealed that a number of national and regional multiple occupiers, usually found in many town centres, are absent from Stafford. In order to ascertain if there are any underlying reasons for such absences, a number of retailers were contacted and views were sought on the commercial standing of Stafford as a potential retail location.

The issues that were specifically raised with operators included:

- The familiarity with Stafford retail centre
- The awareness of the existing national retail multiples in the town
- The likelihood of locating within the town
- Any factors inherent in any location decision.

A number of key messages were evident which demonstrate the general perceptions of Stafford Town Centre and its potential to attract quality retail occupiers. A summary of these key messages is set out below.

- Almost all operators are aware of Stafford in terms of its geographical location, its general size and function and its relationship with surrounding competing centres. They were not however, necessarily aware of specific occupiers that currently existed in the town.

- Many operators consider that there is a lack of quality retailers, of equal standing to their own in the town. This means that it is not regarded as a particularly high-grade centre and that the incentive for investment is lacking.

- Several operators cited their preference to locate in larger towns and cities or in modern, prestige retail environments. These are considered to have a wider retail draw and serve a wider public catchment.

- It was also a view of several operators that the retail catchment for Stafford was neither prosperous nor affluent enough to supply the requisite number and type of paying customer. Some operators cited the influence of local economic indicators and demographics in terms of determining their investment decisions.

- The perceived absence of any significant tourist trade within Stafford was identified as a factor, which contributed to some operators' decisions to rule out Stafford as a potential development opportunity.

- Several operators cited the competitive advantage of other centres in the region such as Telford, Hanley and Birmingham. Evidently in some cases, the presence of existing outlets in these centres was felt to already cover the Stafford market.

- The larger department stores which were contacted felt that, whilst they would not rule out locating in Stafford, at the present time there was no site identified which was either sufficiently large enough to accommodate their requirements or indeed available in a sufficiently prime location. The view was also expressed that any likelihood of locating there would be enhanced if a comprehensive scheme could be provided which incorporated various new outlets and possibly provide a new (or additional) primary focus to the town.

9.4 Feedback From the Focus Group

A meeting was held with retailers, other commercial organisations and representatives of groups with an interest in Stafford Town Centre. Opinions were canvassed on the relative strengths and weaknesses of the town centre. Although inevitably there were some differences of view, in general there was consensus on a number of issues.

A summary of the key messages is set out below:

- The current trade mix, which includes both independent traders and a range of multiples, is one of the town's strengths.

- More could be done through promotion to enhance the town's image, particularly to attract more visitors to the town centre. Local festivals and the Britain in Bloom initiative are welcome and have been successful and further promotional activities are needed. For example many visitors attend events at the County Showground but do not visit the town centre.

- The current market area is very poor environmentally, lacks atmosphere and does not attract shoppers. Consideration should be given to an alternative outdoor location in the form of a traditional street market. Walsall market was quoted as being a very successful example. This issue was felt to be particularly important.

- It would be helpful to have more evening attractions such as wine bars and quality restaurants. The evening economy is currently not at all strong.

- Access and parking are seen as critical with the general impression that shoppers will go elsewhere if they cannot find convenient, reasonably prices car parking. The Tesco car park needs further refurbishment to the lifts and stairwells. This is of particular importance to the success of traders at this southern end of the town in the Bridge Street area.

- There was a general feeling that more parking is needed.

- The needs of less mobile people must be recognised.

- Traffic congestion also affects trade in the town centre, especially when there are problems on the M6 motorway.

- The south end of the town has been neglected. Further development would stimulate trade. Environmental improvements are also needed, together with convenient car parking.

- More regular dialogue with the Council is felt to be important. The Chamber of Commerce would wish to be involved in regular liaison on matters of mutual interest.

10 TOWARDS A STRATEGY

10.1 Swot Synthesis

In order to arrive at a realistic and deliverable strategy, it is important to ensure that it is based on a thorough understanding of the town centre's current and future opportunities and limitations.

Therefore, the first and most important stage of the development of the strategy involves identifying the true strengths and weaknesses of the town centre and consequently, priorities for action.

Our broad overview of the Stafford's Town Centre's opportunities and limitations are provided in the form of a SWOT analysis. The SWOT has been prepared on the basis of:

- A detailed town centre appraisal and 'health check';
- An examination of key economic sectors and future trends;
- Analysis of the future prospects for Stafford;
- Responses by local traders to a questionnaire survey and a focus group meeting;
- Discussions with key local, regional and national agents, developers and investors; and
- Discussions with key agencies involved in local economic development and regeneration of the town centre.

The table below provides a summary of our SWOT analysis. This analysis has guided the preparation of our recommended strategic framework for the sustained enhancement of Stafford Town Centre.

STRENGTHS	WEAKNESSES
• Below average vacancy rates • Stable trading position • Good range of multiples given catchment size and profile • Limited but loyal catchment • Strong independent retail sector • Attractive historic townscape • Availability of car parking • Key anchor foodstores • Public transport links • Cinema and leisure facilities • Security and cleanliness • Town centre management structure	• Perceived lack of key retailers and major stores • Current image and external perception • Limited number of quality café bars/restaurants • Limited sites for redevelopment • Limited national profile • Poor links with traders/consultation • Limited training support for indigenous businesses • 'Severing' effect of South Walls/Mill Bank • Limited investment targeted at Southern end of the Town • Limited profile of indoor market • Limited contribution to town centre economy by tourists and office employees
OPPORTUNITIES	**THREATS**
• Secure additional floorspace through innovative redevelopment schemes • Improve investment in the southern sector of the town focusing on leisure uses • Enhancement of the evening economy • Build on tourism potential [illegible] • Improve external image • Increase number of visitors from outside the primary catchment • Creation of a more effective and vibrant market/market place	• Competition from centres such as Hanley, Telford and Cannock • Ineffective implementation of a future tourist strategy • Inability to assemble future town centre sites • Further pressure for out-of-centre development • Loss of independent retailers • Shopping by mail order, telephone or computer • Traffic Congestion

10.2 The Future Vision for Stafford Town Centre

The process of town centre revitalisation is complex, requiring action on a number of fronts in a co-ordinated and timely fashion. As highlighted throughout this report, there are a wide variety of strengths and weaknesses, which dictate the town's current vitality and viability. From our analysis, we can confirm that Stafford does not currently suffer from the 'deep rooted' economic limitations, which are affecting other less fortunate town centres throughout the UK. However, there are a number of key issues that have arisen during the study that will influence the future strategic direction to be adopted.

Any improvements and development proposals in Stafford Town Centre will need to be considered against the Council's long-term aspirations for the centre. Proposals will also need to be viewed against emerging national and local trends and the risks associated with projecting these trends. There are three broad approaches that could be adopted by the Council, as summarised below.

- **Do nothing** – the Council could leave the future development and promotion of Stafford Town Centre to the market. Therefore, it would be left to the property market to respond to future changes. The delivery of this approach has the lowest level of financial commitment, but may lead to a decline in Stafford's role and status within the regional/local hierarchy.

- **Maintenance of its current status** – Stafford would be maintained and improved modestly to ensure that it retains its current role within the hierarchy. The aim will be to build on the centre's current strengths rather than radical change.

- **Expand and change its status** – Stafford would be expanded and improved in order to try and enhance the centre's position within the hierarchy.

The Council will need to decide which broad approach should be adopted for Stafford, before it embarks on any improvements or the development opportunities outlined in this study. Clearly, the *'do nothing'* approach will require no major action from the Council, whilst the other options may require intervention.

Maintenance of Stafford's Status

As indicated earlier, Stafford is experiencing increasing levels of interest form additional national retailers and therefore, there may be scope to improve the range and quality of facilities in order to maintain the town's position within the hierarchy. This could be achieved via the gradual improvement of retail occupiers in the primary retail areas, up-grading the quality of commercial premises, better promotional activities and continued improvements to access/movement and the environment within the town centre. For example; the possible refurbishment/redevelopment of the Sheridan Centre and improvements along Princes Street/Crabbery Street.

This option would entail only modest increases to the provision of retail floorspace, and would focus more on strengthening and diversifying existing uses.

Enhancement of Stafford's Status

If the Council wish to significantly enhance (rather than simply maintain) Stafford's status in the light of increasing competition, then it will be necessary to identify major redevelopment opportunities. The timing and scale of radical re-development will be dependent on a number of factors relating to; future consumer and occupier demand, critical mass, property values and the availability of a site large enough to accommodate major development.

At present there is limited scope for further expansion of Stafford Town Centre. Short-term prospects are particularly limited. However, longer-term growth in consumer expenditure and values may generate scope for the expansion of facilities in Stafford. Longer-term demand, particularly for retail development, will need to be kept under review. If demand for mixed-use development does emerge then the Council will need to have identified viable development opportunities.

The risks involved in delivering this approach are as follows:

- Predicting long term trends is difficult. The level and nature of demand cannot be predicted accurately.

- The assembly of a large re-development site will take a considerable time and the co-operation of a number of landowners.

- Re-development may involve the loss of existing occupiers and will cause considerable disruption.

There are no obvious and easy sites for major new commercial development in Stafford Town Centre. However, if the Council wish to respond to long-term demand it will be necessary to promote and assemble sites, probably for mixed retail, leisure and residential uses.

10.3 Recommended Approach

If the Council adopt the *do nothing* approach then there is a danger that Stafford will experience a gradual decline in its role in relation to its competitors. The short-term options (during the next five years) to significantly expand and change Stafford's role and status are limited. However, in the longer-term (5-20 years) there may be redevelopment opportunities capable of expanding Stafford's role as a commercial centre. Therefore the recommended strategy for Stafford is as follows:

- up to five years (maintain status) – gradual improvements to Stafford's offer in order to respond to increasing competition and consumer demand whilst continuing to develop the opportunities for the longer term;

- longer-term (enhance status) – implementation of redevelopment opportunities to expand and diversify Stafford Town Centre.

10.4 Strategic Objectives

In order to develop a robust and realistic strategy it is important to understand how 'areas of opportunity' and specific improvements within the town centre can help to fulfil the overall vision. Six objectives have been identified that could provide a framework for the strategy. A number of these objectives endorse the aims of the existing Town Centre Strategy. In no priority order, the objectives are as follows:

1. **Future Retail Provision** - seek to identify future opportunities for the expansion and enhancement of the existing retail provision to serve long term aspirations, recognising that short term opportunities are limited.

2. **Indigenous Growth** – seek to enhance the future performance of existing independent traders within the town centre through enhanced town centre management and wider promotion of Stafford's key strengths.

3. **Townscape and the Environment** - seek 'area based' environmental enhancements to improve the overall shopping experience/ambience as well as strengthening trader's commitments to the town.

4. **Economic Diversification** - seek to encourage further diversification of the town centre's economic base, by focusing on the attraction of leisure and residential uses specifically targeted within the southern quarter of the town.

5. **Accessibility and Movement** - investigate ways of improving and encouraging pedestrian circulation throughout the town, including linkages between existing shopping facilities. In addition, opportunities for increased access by foot, bicycle, public transport and private motor vehicles should be investigated.

6. **Tourism Focus** – seek to enhance/improve Stafford Town Centre's current limited external perception/image in partnership with wider tourism initiatives throughout the Borough and the County.

7. **Wider Involvement** – seek to build existing joint working between the Council and the private sector and to broaden the scope of this involvement, particularly with regard to overall consultation and town centre management/promotional activities.

Building on these objectives, potential improvements for key 'areas of opportunity' have been outlined in the remainder of this section.

10.5 Areas of Opportunity

This study has highlighted a number of opportunities that may meet the Council's objectives for the future prosperity and development of the town centre. These opportunities range from site specific improvement areas through to promotional and town centre management activities. The key areas of opportunity identified are highlighted below.

The Sheridan Centre

The Sheridan Centre is located to the Northern edge of the town centre bound by the Queensway inner ring road to the north. The Centre currently provides two large units, which accommodate the existing Argos and Iceland stores, as well as providing 15 other small retail units, which link Gaolgate Street with Princes Street.

As the prime shopping pitch has steadily 'drifted' from the area around Marks and Spencer towards the existing Boots on Market Square the footfalls in and around the Sheridan Centre have been dramatically reduced. Pedestrians now appear to flow from Sainsbury's at Chell Road through the covered walkway outside Iceland and then turn right up Princes Street which takes them towards Gaolgate and the Guildhall Shopping Centre.

With this reduction in overall footfalls and prominence, the smaller units within the arcade have begun to suffer with a high number of vacant units and potential voids. Clearly, the restricted size of the units and their somewhat 'off-pitch' location would suggest that demand is likely to be limited especially with its current dated arcade format.

Therefore, we believe that there is an opportunity to examine the possibility of a refurbishment or redevelopment scheme that would seek to provide more flexible and modern accommodation that may appeal to modern retailers requirements. In addition, it is critical that any future development must seek to provide a key attraction that could anchor the northern edge of the town centre to overcome the current 'dead end' effect that is created where Gaolgate Street meets Gaol Square.

Chell Road/Broad Street Area

The possible opportunities that exist within the area bounded by Chell Road and Broad Street could seek to build upon any future redevelopment/refurbishment of the Sheridan Centre. Clearly, Sainsbury is a strong anchor for the northern end of the town and its established links through to Princes Street impact significantly on the overall vitality and viability of this area. Therefore, we feel that there is a future opportunity to build upon these existing strengths and examine the possibility of the future redevelopment of this area for retail and leisure uses.

The site incorporates the existing Wilkinson store (formally Sainsbury), several small retail units along Mount Street, the Trinity United Reformed Church and over 220 surface car parking spaces. Whilst we recognise the importance of retaining both the church and the provision of parking, there is clearly an opportunity to examine redevelopment options which would improve the legibility of this area which for many who park at Sainsbury's is their 'gateway' to the town.

If the site is to be developed, then any future options must consider the possible displacement of the parking provision by providing spaces within the scheme or elsewhere.

Clearly the redevelopment of this site will prove a long term opportunity but must be considered in the overall strategy for the re-development of the Sheridan Centre and other options including the Indoor Market.

St John's Market Hall and Market Square

As highlighted previously, feedback from various operators and key investors suggest that the current location and operation of the market is seen as a weakness and a potential 'lost opportunity'. In addition, consultations with agents and developers who are active within Stafford have identified that there may be a future opportunity to relocate the existing indoor market outside and potentially secure a department store operation within the existing Market Hall. However, this option has yet to be explored with the Borough Council.

From our own observations, it appears that the existing market hall is not trading to its full potential. Clearly, although the market is in a similar location to where it was before the development of the Guildhall Centre, it appears to be somewhat 'off-pitch' in relation to the prime retail core. Although we recognise that markets tend to have a loyal customer base who will shop there regardless of its location in the town, we feel that the market would offer greater potential to the town if it was closer to the areas of major footfall.

The most obvious location for the market would be the existing Market Square, which would not only add additional vibrancy to the area but would also provide a more prominent and viable location for traders. Many other market towns benefit from the 'hustle and bustle' of street market operations, whereas the vastness of Stafford's existing Market Square is somewhat 'sterile' when there are no events being held.

However, there are a number of issues that will need to be explored if the relocation of the market is to be successful for the future of the town and most importantly its traders. They include:

- The willingness of traders to operate from an outside stall and accept the constraints associated with such an operation;
- Implications in relation to the market rights and the permanence of stalls (i.e. are they left out over night?);
- Securing a potential location which does not conflict with current town centre management initiatives; and
- Whether or not the re-occupation of the market hall will prove viable for a modern large store operation

We recognise that Market Square may not prove a viable alternative in the short term as the square is currently seen as a major events and festival venue for the implementation of town centre management initiatives. These operations are fundamental for the town's future success and image development and should not be overlooked.

Therefore, if a balance cannot be struck between the operation of a successful outdoor market and the running of key events and festivals at Market Square then alternative locations should be considered. Such options could include placing stalls along Goalgate Street, Greengate Street and Crabbery Street. A further alternative could be to relocate the market to one of the car parks at Broad Street which although somewhat 'off-pitch' it could benefit from the pedestrian flows to and from Sainsbury as well as adding vitality to the overall area.

What is critical, is that the market appears to have lost its overall appeal and competitive edge in its current format and location. Therefore there is an urgent need to rejuvenate the markets function whose contribution to the overall vitality and viability to the town as a whole cannot be over looked. The most obvious solution would be to re-launch the market function in a more traditional format with dedicated market days and a prime 'high street' location.

Land off Tipping Street

The site comprises the Staffordshire County Council and Stafford Borough car parks between South Walls and Tipping Street. Supplementary Planning Guidance has been prepared for the site which seeks a high quality development in keeping with the town's historic feel but remains flexible in the range of uses that would be permitted. The site has recently been examined for potential office development for the public sector but this is now unlikely to come forward.

The simplicity of any land assembly exercise on this site would prove attractive to any future developer. However, the current location of the site is somewhat 'isolated' from the prime core of the town and areas of significant footfall. Therefore, if any commercial development is to take place on this sight which requires prominence then it is imperative that the scheme establishes key linkages with Greengate Street.

It is unlikely that the existing retail premises which front Greengate Street south of Tipping Street could be incorporated within the overall redevelopment scheme as they are currently fully occupied and could prove expensive to assemble. In addition, the strong architectural features of these buildings add to the overall quality of the townscape along Greengate Street. Therefore, the only opportunity to forge links with the pedestrianised area of Greengate Street would be via Tipping Street.

From our appraisal of the site, it is evident that there is an opportunity to provide a gateway feature along Tipping Street to encourage pedestrians to flow between the central retail core and the potential redevelopment opportunity. If a successful linkage could be 'forged' then it is possible that the site could be considered for retail development which would more likely form part of a wider mixed use scheme.

Establishing linkages with the prime shopping core will be just as important for the future success of the town as it will for the potential developer and end user. Isolated development of the site for retail uses could potentially impact upon the rest of the town and threaten the current 'focus/centre of gravity'.

However, comprehensive redevelopment for retail uses only, is unlikely to prove viable. We feel that the site will have greater potential for a mix of uses including ground floor retail units with either residential or office on upper floors.

In order to fully understand the true potential of the site for redevelopment it is essential that some market testing is undertaken to help narrow down the potential uses that could be secured. Clearly, if a developer is willing to provide a comprehensive retail scheme that can be effectively linked to the prime retail core then this is likely to prove the most advantageous in terms of the future expansion of the town's retail base and the likely land values that can be achieved.

Riverside/Bridge Street

The deliverability of the potential opportunities that exist within this area will be primarily driven by the potential relocation of the existing Tesco Store. As highlighted previously within the report, agents and developers recognise Tesco's future needs to secure a more modern store within or on the edge of the town to ensure its future role within Stafford.

If Tesco manage to secure an alternative location and a more modern store, It is unlikely that Tesco, in the short-term, will seek to comprehensively re-develop their existing premises rather than let the building to an alternative retailer. However, careful consideration must be given to the overall enhancement of this area including the existing Allied Carpets and Tesco's service yard.

Although any potential re-development scheme in this area is unlikely to come forward within the short to medium term, there would be the potential in the longer term for some form of mixed leisure development that could take full advantage of the riverside location.

Clearly, any future scheme will be heavily reliant on the success of the proposed re-development at Friar's Walk which, if successful, will act as an important catalyst for the southern area of the town.

However, until the uncertainty over the future of Allied Carpets and the potential relocation of Tesco is resolved then this must clearly be treated as an aspiration rather than a firm re-development option.

Friar's Walk

Plans for the re-development of the site including the County Council's premises and Rail Track's goods yard, are currently being developed. Key elements of the mixed use scheme could include both food and non-food retail, as well as a major leisure complex possibly incorporating a new multiplex cinema and café bars/restaurants.

The leisure development plans to incorporate the former Grammar School building, which will be converted in a number of leisure units, with the potential retail element being located to the western edge of the site close to the existing railway line.

Clearly, if retail development is to be secured within this development opportunity, then it is essential that additional measures that will encourage pedestrian movement into the town be provided, including adequate pedestrian crossings and signage. This will hopefully facilitate potential 'spin-off' benefits for other operators within the town.

Overall, we believe that the proposed scheme will form the all-important catalyst that will drive the regeneration of this southern quadrant of Stafford Town Centre forward and should be fully supported and encouraged.

Land off Newport Road

Similar to the potential opportunity at Tipping Street, supplementary planning guidance has been prepared for this site which again provides a similar level of flexibility. The site itself has previously been subject to a planning application for an Aldi supermarket, which was refused planning permission.

Although we believe that the provision of a discount food operator on the site could have benefited the town centre as a whole, we feel that the likely access implications would limit such an option. Clearly, any development, which may occur on the site, will have to be sensitive to the limited access issues with the exit of the site located so close to the Bridge Street/Newport Road junction.

In addition to accessibility, other key constraints for the site include its visibility/prominence and the surrounding environment. Clearly, the site would have greater potential of redevelopment if the buildings fronting Newport Road excluding the Coliseum nightclub could be included in the overall package. Not only would this provide a more prominent site, but there would also be sufficient land to improve the accessibility issues that currently constrain the range of uses applicable.

Clearly, the future success of this site is likely to be governed by the success of the Newport Road/Friars Walk scheme, which could provide sufficient momentum in this area of the town to 'spark' future developer interest. The site may then form part of a wider land assembly exercise, which will incorporate further premises along Newport Road.

Accessibility and Car Parking

Pedestrian access and signage within the primary retail core is generally good. There are a number of areas for improvement as outlined in Section 4.

Car parking is an important issue for all occupiers and local businesses. Views are mixed with regard to the adequacy of the current provision and mix of short and long stay spaces. Nevertheless, public car parks are conveniently located and are an important asset to the town centre. The lack of development sites and new central government guidelines on the number of parking spaces will limit the scope for providing further car parking (public or private).

It is our view that car parking is a critical element of the overall economic performance of any town centre. Clearly, if provision is limited and considered to be expensive then shoppers will travel greater distances to competing centres to avoid such problems. As highlighted in Section 4 of this report, it is evident that we consider the current supply within Stafford to be adequate to meet current requirements. In addition, evidence from the Town Centre Shopper Survey demonstrates that only 12.5% of those interviewed found it difficult to park and only 3.5% found parking to be expensive.

Therefore, the future strategy for Stafford should seek to concentrate on retaining and managing current provision, and where possible securing additional spaces as part of the development opportunities highlighted above, whilst encouraging the use of public transport.

Proposals to improve the railway station should help with the promotion of public transport.

Town Centre Management and Promotional Activities

The Council's town centre management activities and structures are now well established. A strong programme of promotional events and joint working are in place. The Council's commitment to town centre management over the last few years now provides a good platform for:

- extending the range of promotional activities; and
- building a consensus and agreed strategy amongst interested parties.

These activities can help to pull together the strategy objectives for the town centre into a shared vision for the centre as a whole.

However, there is a general consensus from traders and organisations with an interest in the future development of the town centre, that consultation with local officers and members is poor, despite the willingness of traders to become more involved in future initiatives. This concern is somewhat detached from the town centre manager's role (which is considered to be highly successful) and relates more to local consultation between elected members and the business community of the town.

It is evident that there is an opportunity to establish a local forum within which traders, council officers and members could meet on a regular basis to discuss future opportunities within the town and any local issues/concerns that traders may have and want to raise with the Council. Clearly, such an exercise has not been undertaken for over four years and local businesses feel that strategic decisions are being made with effective consultation.

Clearly, if any future strategy is to be successfully implemented then local ownership of the key priorities will prove critical to its overall success. This highlights a clear need for a structured programme of consultation, which enables the development of a productive interface between local authority priorities and the needs of local businesses.

Economic Diversification

Diversification of the town centre's economy must be a key objective of the Council. The opportunities relating to leisure, entertainment, tourism and residential uses described above will help this diversification process. For example, the promotion of a themed leisure, entertainment and restaurant quarter should build on, and diversify, the town centre's evening economy.

Longer Term Redevelopment Opportunities

As indicated in the previous section, the scope for major mixed redevelopment within the town centre is limited. Opportunities that do exist are likely to be long-term developments. Nevertheless, if the Council is keen to see the implementation of mixed use schemes in the future then the planning and assembly of these sites should be considered now. It is unlikely that the market will bring forward these opportunities for the foreseeable future. There is also a danger that the refurbishment and re-investment in poorer accommodation will remove certain opportunities for redevelopment within the town centre (i.e. the Sheridan Centre and the existing Tesco store).

The Council should identify priority mixed use redevelopment sites. If sites are identified as being worthy of further exploration then it may be necessary to undertake a more in-depth analysis of the selected sites. This analysis should examine the feasibility of mixed-use developments in terms of:

- land ownership and availability;
- longer term commercial viability;
- broad cost implications;
- potential sources of funding;
- access and circulation; and
- the benefits and appropriateness of these opportunities.

If mixed-use development is unlikely to be attractive from a commercial perspective, it may be necessary for the Council to become involved in the implementation and assembly of these opportunities probably in partnership with the private sector.