EXECUTIVE SUMMARY

Scope and Purpose

1. WYG Planning & Design (WYG) was commissioned by Shropshire Council in March 2010 to undertake an update of the Shrewsbury Retail Study (SRS). The SRS was originally undertaken by WYG in 2003 and was the subject of an earlier update in 2006.

2. The objectives of the SRS update were established by the Council's Project Brief, dated February 2010, with the key focus being the provision of an up-to-date assessment of the future capacity for retail development in Shrewsbury in accordance with national planning policy. The update is of particular importance given the downturn in the UK economy since the completion of the previous update, which has had a notable impact on the retail sector.

Market Research

3. A key element of this study was to obtain a detailed understanding of shopping patterns in terms of the use of Shrewsbury Town Centre and the identification of the centre's catchment area. This was achieved by undertaking original market research in the form of a household survey.

4. The survey of 1,000 households was undertaken in April within a Study Area which corresponds to that used by the 2003 Shrewsbury Retail Capacity Study. The Study Area was originally defined on the basis of a 20-minute drivetime, which was then subject to amendment to take into consideration competing centres and their retail offer. The use of the same Study Area allows direct comparison to be made with regard to shopping patterns and the performance of the town's retail offer over time.

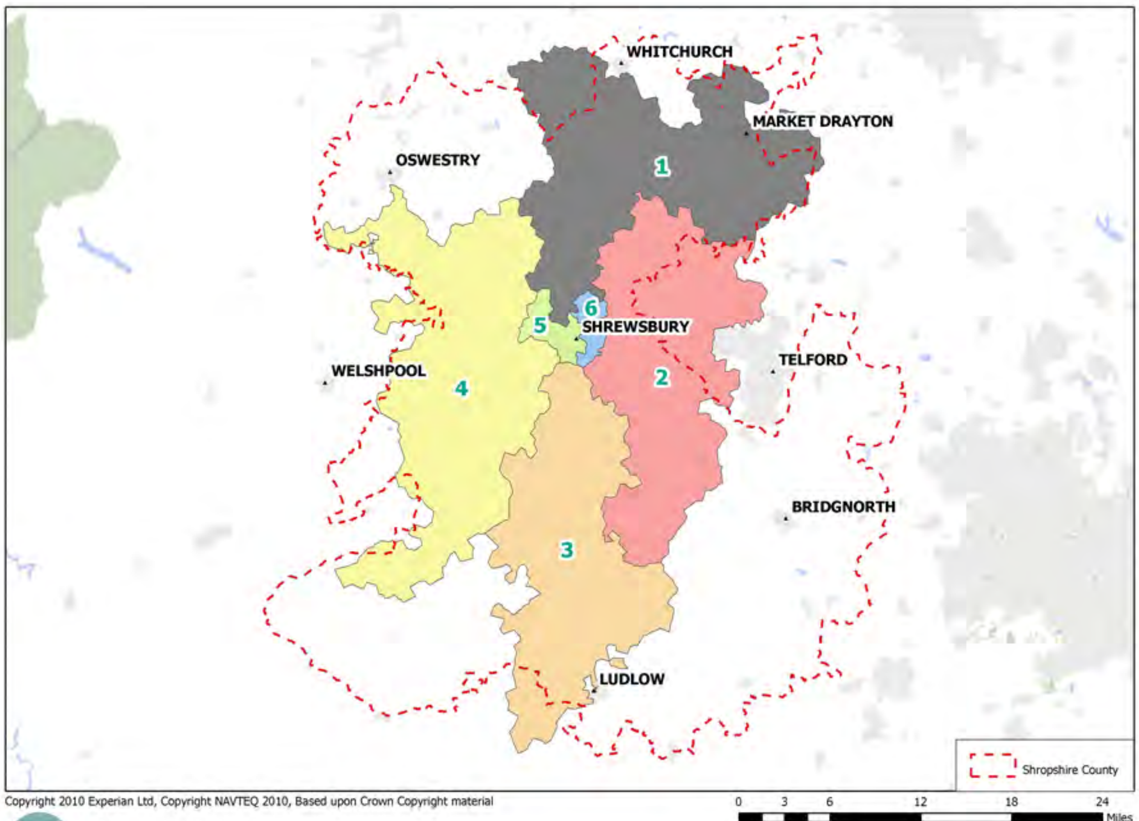
5. Table 1 sets out the postal codes adopted in defining each of the six survey zones used for the study.

Table 1: Post Codes by Survey Zone

Survey Zone	Post Code Sectors
Zone 1: Shrewsbury North	SY4 3, SY4 5, SY13 2, SY13 3, TF9 1, TF9 2, TF9 3
Zone 2: Shrewsbury East	SY4 4, SY5 6, TF5 0, TF6 5, TF6 6, TF13 6
Zone 3: Shrewsbury South	SY3 0, SY5 7, SY6 6, SY6 7, SY7 9, SY8 2
Zone 4: Shrewsbury West	SY4 1, SY 4 2, SY5 0, SY5 8, SY5 9, SY9 5, SY10 8
Zone 5: Shrewsbury Central West	SY1 1, SY1 2, SY3 5, SY3 6, SY3 7, SY3 8, SY3 9
Zone 6: Shrewsbury Central East	SY1 3, SY1 4, SY2 5, SY2 6

6. The catchment boundary is drawn so as to take into consideration Telford Town Centre, as the vast majority of the resident population beyond our defined catchment to the east will undertake their shopping in nearby Telford. Conversely, due to the limited amount of retail facilities located to the north and south of Shrewsbury, we have purposely extended the catchment in these directions beyond the 20 minute drivetime base. A map of the catchment is provided below by Figure 1.

Figure 1: Study Area and Zones for Shrewsbury Retail Study



7. For the purposes of this study, the primary catchment area (PCA) of Shrewsbury comprises the central area which immediately surrounds the town, i.e. Zone 5 and Zone 6.

Vitality and Viability of Existing Centres

8. In accordance with PPS4, as part of this study an assessment of the 'health' of Shrewsbury Town Centre has been undertaken. The findings of this assessment are summarised in the SWOT analysis (assessing strengths, weaknesses, opportunities and threats) which is presented as Table 2 below.

Table 2: SWOT Analysis of Shrewsbury Town Centre

Strengths	Weaknesses
▪ Anchored by the Marks & Spencer and Rackhams stores. ▪ Strong comparison goods offer. ▪ Adequate retail service sector. ▪ A rise in Zone A rents. ▪ Good accessibility. ▪ Excellent environmental quality. ▪ Local market. ▪ Large premises. ▪ Good mix of Independent/specialist traders & national multiples. ▪ Strong evening economy.	▪ Weak convenience goods offer within town centre. ▪ Fairly weak leisure services offer. ▪ Weak financial and business services sector. ▪ Decline in rank in the sub-regional shopping hierarchy. ▪ Steady decline in retailer requirements. ▪ Comparatively high proportion of vacancies. ▪ Increasing commercial yields.
Opportunities	**Threats**
▪ Attract a commercial leisure operator to help improve the leisure offer. ▪ Greater promotion of the centre. ▪ Availability of town centre retail sites. ▪ Opportunities to utilise riverside locations. ▪ Recent improvements to the town centre cultural offer (i.e. Theatre Severn) could assist in supporting other businesses.	▪ Improvement at competing centres including Telford. ▪ Continued growth of online shopping. ▪ The recession may lead to increased vacancies in the town centre. ▪ Potential over dominance of major department stores. ▪ Potential decline of independent traders as a result of the recession.

Key Shopping Trends

9. The results of the household survey are utilised in estimating the market share claimed by each of Shrewsbury's current retail facilities. The survey is also of use in ascertaining the frequency of visit to key shopping facilities, the incidence of linked trips, the most popular means of accessing town centre facilities, and so on.

10. The principal findings of the survey are as follows:

Main Food Shopping

- Three stores in Shrewsbury attract almost half of all main food shopping expenditure which originates from within the Study Area, these being the Sainsbury's store at Meole Brace (17.4%), the Morrisons store at Whitchurch Street (15.4%) and the Tesco Extra at Harlescott (12.8%).
- Almost half of those surveyed (47.2%) indicated that the principal reason for choosing their main food shopping destination was its proximity to their home, followed by the fact that the store offers low prices (12.5%) and then by the choice of food goods available (7.6%).

- A large majority of respondents use the car in travelling to do their main food shop (89.9%), with the next most popular means of transport being by foot (5.6%) and then by bus (2.9%).
- Approximately two-thirds of respondents (65.7%) do not link their main food shopping trip with any other activity, with the most popular activities of those that do being non-food shopping (12.8%) and leisure activities (10.3%).

Top Up Food Shopping

- The survey indicates that large supermarkets within the Study Area also claimed a high proportion of top up food shopping. The most popular destinations for top up expenditure are the Sainsbury's store at Meole Brace (6.9%), the Asda at Old Potts Way (5.9%), and the Tesco Extra at Harlescott (4.3%).
- As would be expected, the household survey indicates that top up shopping trips tend to be undertaken on a more frequent basis than main food shopping trips, with 5.5% of respondents undertaking such shopping trips on a daily basis, 42.4% at least twice weekly, 39.0% at least weekly and 6.9% at least fortnightly.

Non-Food Shopping

- Shrewsbury Town Centre is the most popular retail destination for clothing and footwear (with 62.5% of respondents indicating that this was the destination for their last shopping trip for such goods); for books, CDs and DVDs (51.7%); for small household items (60.4%); for toys, games, bicycles and recreation goods (51.6%); for chemist goods (52.7%); and for furniture, carpets and floor coverings (54.6%).
- The goods types for which Shrewsbury Town Centre is not respondents' most popular retail destination are electrical items (with Meole Brace Retail Park securing 29.5% of such shopping trips); DIY goods (with the B&Q at Featherbed Lane securing 23.6% of such trips); and gardening items (with Dobbies Garden World at Hereford Road securing 34.8% of such trips).

Accessing Shrewsbury

- As would be expected, a majority of respondents (83%) visit Shrewsbury Town Centre at some time to use its facilities.
- Of those who visit Shrewsbury, the most popular stated reasons for visiting include non-food shopping (cited by 72.8% of respondents); food and grocery shopping (36.1%); social and leisure activities (36.1%); and to access professional services, such as banks, estate agents, and so on (31.7%).
- Almost two-thirds of respondents make their journey to Shrewsbury by car (63.3%), with other notable means of transport being by bus (16.6%) and by foot (13.3%).

- In terms of frequency of visit, 6.9% of respondents visit Shrewsbury Town Centre daily, 36.4% visit once a week or more, 8.2% visit less than once a week, 20.1% visit less than once a fortnight and 27.2% visit less than once a month.
- The most frequently cited reason provided by those who do not visit Shrewsbury for their failure to use the centre is that there are other facilities closer to home (44.7%). The next popular response was that there is 'no reason in particular' for their failure to visit, followed then by a perceived lack of car parking provision (10.0%) and then by the centre's apparent poor accessibility (8.2%).

Internet Shopping

- Of those surveyed, more than half (54.9%) make use of internet shopping and a further 5.4% make use of TV shopping. Only 43.8% of respondents fail to make use of either one of these types of electronic home shopping.

Study Area Population

11. The population within each postal code sector has been calculated using MapInfo AnySite Report data. The baseline population has then been projected forward based on population projections identified by MapInfo, which have then been derived from mid-year ONS based population estimates for each survey zone.

12. On this basis, the identified Study Area is estimated to contain a resident population of approximately 183,592 people in 2010, rising to 190,613 people by 2015, to 199,271 people by 2021, and to 206,828 people by 2026. This represents an increase in population within the Study Area of 23,236 people (or 12.7%) between 2010 and 2026.

13. Table 3 provides a detailed breakdown of the forecast population change within each survey zone in the period through to 2026.

Table 3: Population by Survey Zone (2010 to 2026)

Zone	2010	2015	2021	2026
1. Shrewsbury North	40,333	42,333	44,754	46,877
2. Shrewsbury East	24,986	26,486	28,463	30,222
3. Shrewsbury South	23,598	24,541	25,633	26,581
4. Shrewsbury West	26,127	27,226	28,515	29,637
5. Shrewsbury Central West	34,192	35,090	36,294	37,328
6. Shrewsbury Central East	34,356	34,937	35,611	36,183
TOTAL	**183,592**	**190,613**	**199,271**	**206,828**

Source: MapInfo AnySite Data (2007)

Retail Expenditure Growth

14. In order to calculate convenience and comparison expenditure per person, WYG again utilises MapInfo AnySite Report data, which provides detailed information on local consumer expenditure taking into consideration the socio-economic characteristics of the local population.

15. The base year for the MapInfo expenditure data is 2007. Growth forecasts have been derived from MapInfo Information Brief 09/02, which was published in September 2009. Importantly, the latest expenditure forecasts take into account the current downturn in the UK economy, which has had an impact on the retail sector. For the purposes of this study, the following annual growth forecasts have been applied.

Table 4: Expenditure Growth Forecasts

Year	Convenience	Comparison
2008	-0.7%	+4.6
2009	-0.8%	-2.7%
2010	-0.8%	-2.7%
2011 to 2014	+1.1% per annum	+3.8%
2015 onwards	+0.7 per annum	+4.5%

16. The latest growth forecasts suggest that the current downturn in the economy will continue to impact upon future expenditure, at least in the short term. However, over the medium to long term it is expected that the forecast levels of growth will increase as the economy recovers to levels commensurate with those identified by MapInfo prior to 2008. Using the above growth rates it is possible to produce expenditure estimates for each survey zone in the period to 2026. The assessment takes into account both retail expenditure growth and population change.

Study Area Retail Expenditure

17. Given the above estimated population and expenditure increases, it is estimated that the resident population of the Study Area generates some £309.37m of convenience goods expenditure at 2010. This is forecast to increase to £396.32m by 2026, which represents an increase of £86.95m (or 28%) between 2010 and 2026.

18. In terms of comparison goods expenditure, the resident population within the Study Area is identified as generating £516.46m of comparison goods expenditure at 2010. Given the forecast growth in population expenditure, this is expected to increase to £1,147.25m by 2026. This represents an increase of £630.79m (or 122%) between 2010 and 2026.

Shrewsbury's Market Share

19. Having calculated the likely levels of expenditure which are generated by the resident population within the Study Area, the next step is to identify what proportion of this expenditure is currently attracted to retail facilities within Zone 5 and Zone 6, which constitute Shrewsbury's primary catchment area (PCA).

20. As previously highlighted, this study has involved the completion of 1,000 household telephone interviews within the defined Study Area. By analysing the results from the survey, it is possible to estimate the levels of expenditure which are directed towards Shrewsbury's shopping facilities.

Convenience Goods

21. Table 5 below indicates that shopping destinations within the PCA account for around 63.0% of main food shopping expenditure generated by residents of the Study Area. The proportion of main food shopping expenditure which originates from within the PCA and is retained within the PCA is 95.9% (calculated by combining the market shares of Zone 5 and Zone 6). This suggests that, within the PCA, only a very limited number of main shopping trips indeed are directed to locations outside of Shrewsbury.

22. In terms of 'top-up' convenience shopping, existing facilities within the PCA attract around 47.9% of such expenditure generated within the Study Area. The rate of 'top up' expenditure retention is significantly higher within the PCA at 96.9%, suggesting that residents of the more peripheral zones often choose to use local convenience goods facilities when undertaking 'top up' food shopping. This is to be expected and stops unnecessarily long journeys to purchase a handful of items.

23. Overall, existing facilities within the PCA attract £166.79m of main food shopping expenditure and £21.39m of 'top-up' convenience expenditure generated in the Study Area in 2010. Accordingly, facilities within the PCA attract a total of £188.19m of convenience goods expenditure generated from within the Study Area (a 60.8% market share).

Table 5: Shrewsbury's Current Market Share – Convenience (2010)

Zone	Market Share (%)		
	Main Convenience	'Top-Up' Convenience	Total^
1. Shrewsbury North	26.5	7.1	23.4
2. Shrewsbury East	37.6	18.8	35.1
3. Shrewsbury South	55.3	27.0	50.8
4. Shrewsbury West	66.7	42.3	63.5
5. Shrewsbury Central West	95.6	96.5	95.8
6. Shrewsbury Central East	96.2	97.5	96.3
TOTAL	**63.0**	**47.9**	**60.8**

Source: Derived from Expenditure Tables Provided at Appendix 7 of Main Report
^ Based on cumulative market share of main and 'top-up' food shopping
Based on market share of expenditure

Comparison Goods

24. Table 6 below demonstrates that, within the bulky goods sector, facilities within the PCA are identified as attracting 35.0% of 'Garden Centre Goods' expenditure originating from within the Study Area, increasing to 59.4% of 'Electrical Goods' expenditure, 67.1% of 'Furniture Goods' expenditure and 70.5% of 'DIY Goods' expenditure. In combining the market shares of the above goods types, the bulky goods sector as a whole within the PCA attracts 62.6% (or £91.53m) of such expenditure originating from within the Study Area. The PCA attracts a significantly higher share of bulky goods expenditure which originates from with PCA, with zones 5 and 6 attracting 83.3% and 88.8% of such expenditure respectively. The high market share of expenditure originating from within the PCA reflects the relative strength of bulky goods provision within Shrewsbury and the fact that there are few alternative facilities outside, but in close proximity, to the town.

25. Within the non-bulky sector, facilities within the PCA are identified as attracting 52.9% of 'Books, CDs, etc' originating from within the Study Area, increasing to 61.7% of 'Chemist' goods, 67.0% of 'Clothing & Footwear', 68.3% of 'Toys' and 87.4% of 'Household Goods'. In combining the market shares of the above goods types, the non-bulky sector as a whole within the PCA attracts 65.6% (or £242.91m) of such expenditure originating from within the Study Area. This is slightly higher than the market share for bulky goods (62.6%) and represents a relatively strong performance. In terms of expenditure originating from within PCA zones 5 and 6, the market share for non-bulky goods increases to 86.9% and 87.8%.

26. Collectively (bulky and non-bulky comparison goods), existing facilities within the PCA attract 64.8% of all comparison goods expenditure which originates within the Study Area. This increases to 85.9% and to 88.1% of expenditure generated respectively within zones 5 and 6.

Table 6: Shrewsbury's Current Market Share – Comparison (2010)

Zone	Market Share (%)									
	Clothing & Footwear	Books, CDs, etc.	Household Goods	Toys, etc.	Chemist	Electrical	Furniture	DIY	Garden Centre	Total
1. Shrewsbury North	51.4	32.3	52.5	39.2	25.7	32.1	45.3	39.2	14.9	40.9
2. Shrewsbury East	40.6	33.0	48.4	51.9	40.5	37.3	46.2	46.4	28.6	43.3
3. Shrewsbury South	61.3	55.3	68.8	75.0	48.8	53.1	61.5	69.1	31.1	61.5
4. Shrewsbury West	75.2	55.6	72.2	74.7	65.2	70.0	71.2	74.8	39.2	70.6
5. Shrewsbury Central West	85.9	71.7	85.4	87.3	95.1	78.9	85.7	97.9	52.0	85.9
6. Shrewsbury Central East	85.8	71.5	87.4	89.0	96.6	87.6	93.4	98.6	46.9	88.1
TOTAL	**67.0**	**52.9**	**69.1**	**68.3**	**61.7**	**59.4**	**67.1**	**70.5**	**35.0**	**64.8**

Source: Derived from Expenditure Tables Provided at Appendix 7
Based on market share of expenditure

Retail Capacity

27. WYG has examined the need for new convenience and comparison goods floorspace. Indicative capacity assessments are provided for 2015, together with 2020 and 2026, but any assessment in the long-term should be viewed with caution. Any identified need or capacity identified beyond 2015 is not justification for new retail floorspace outside of centres, as this could prejudice the implementation of emerging town centre redevelopment strategies and the development of more central sites which, although not available for retail development at present, may become available between now and 2015 or after 2015.

Future Convenience Goods Capacity

28. As set out above, existing facilities within the Study Area attract 63.0% of convenience goods expenditure generated within the Study Area. This increases to 95.9% within the PCA (i.e. zones 5 and 6). This suggests that relatively limited expenditure which is generated within Shrewsbury is directed to convenience goods facilities outside of the town.

29. Based on the existing market share, this equates to a convenience goods turnover of existing facilities in Shrewsbury, derived from with the Study Area, of £188.19m in 2010. This compares to an expected turnover of existing facilities (derived again from within the Study Area) of £170.44m. Accordingly, there would appear to be an effective undersupply of convenience goods floorspace with the Study Area. Indeed, our analysis of the performance of existing provision within the Study Area suggests that the out-of-centre Morrisons store at Whitchurch Street and the Sainsbury's store at Meole Brace are overtrading above company average turnover by 67.1% and 42.8% respectively.

30. Given this overtrading and based on current market shares, Table 7 indicates there to be capacity of some £17.75m within the Study Area at 2010, increasing to £33.47m at 2015, £50.01m at 2021 and to £65.11m at 2026.

Table 7: Estimated Capacity for Convenience Goods Facilities in Shrewsbury

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure - £m[2]
2010	170.44	188.19	17.75
2015	172.15	205.62	33.47
2021	174.23	224.23	50.01
2026	175.97	241.08	65.11

[1] Allows for increased turnover efficiency of +0.2% per annum
[2] Assumes constant market share within the Study Area
At 2007 prices

31. Table 8 below converts the identified convenience goods expenditure residual to a floorspace requirement, based upon the typical floorspace turnover of the leading four supermarket operators and based upon the typical floorspace turnover of discount operators. Table 8 indicates that, given the evident overtrading of existing facilities, there is immediate capacity for between 1,460 sq.m (net) and 3,550 sq.m (net) additional convenience goods floorspace, depending on end operator and format.

32. Over the period to 2015, based on current market shares, there is a requirement for between 2,726 sq.m (net) and 6,627 sq.m (net) of additional convenience goods floorspace, rising to between 5,188 sq.m (net) and 12,611 sq.m (net) by 2026. However, capacity in the long-term should be treated with a note of caution.

Table 8: Quantitative Need for Additional Convenience Goods Floorspace in Shrewsbury

Year	Convenience Goods		
	£m	Floorspace Requirement (Net)	
		Min[1*]	Max[2*]
2010	17.75	1,460	3,550
2015	33.47	2,726	6,627
2021	50.01	4,025	9,784
2026	65.11	5,188	12,611

[1] Average sales density assumed to be £12,155 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2009)
[2] Average sales density assumed to be £5,000 per sq.m
At 2007 prices

33. We are aware of a single convenience goods commitment, this being the extant planning permission for 271 sq.m of net sales floorspace at the junction of Barker Street and Claremont Street. We estimate that this permission, if implemented, would account for just £1.36m of the identified convenience goods need. The remaining capacity identified in the

period to 2015 – which is significant – could be accommodated either through the extension of the trading areas of one or more existing stores, or through the provision of an additional store, or through a combination of the two.

Future Comparison Goods Capacity

34. Our analysis of the market share of facilities in Shrewsbury indicates that the current level of trade passing through non-food facilities originating from inside the Study Area is £334.44m. This represents 64.8% of the total comparison goods expenditure generated from within the defined Study Area. Due to difficulties in ascertaining accurate floorspace figures and reasonable benchmark turnovers for town centre stores which include a high proportion of independent traders, comparison goods facilities are considered to be trading 'in equilibrium' at the base year of 2010. From our knowledge of the centre, we consider the turnover identified by the Household Survey to be broadly in line with expectations and the assumption of the current trading performance being 'in equilibrium' is considered to be robust.

35. On this basis, WYG has 'rolled forward' Shrewsbury's current market share to examine the likely comparison goods floorspace required to maintain its current position within the hierarchy. Accordingly, given the increases in forecast comparison goods expenditure and projected increases in the Study Area population, WYG estimates that between 2010 and 2015, an additional £21.62m originating from the Study Area will be spent on all comparison goods (bulky and non-bulky). This identified surplus is relatively modest due to the limited increase in comparison goods spending which is forecast over short term. However, as Table 9 below sets out, the identified expenditure surplus is forecast to sharply increase to £189.73m by 2021 and £328.86m by 2026.

Table 9: Estimated Capacity for Comparison Goods Facilities in Shrewsbury

Year	Turnover - £m[1]	Available Expenditure - £m[2]	Surplus Expenditure
2010	334.44	334.44	0.00
2015	351.50	373.11	21.62
2021	384.34	574.08	189.73
2026	414.05	742.91	328.86

[1] Allows for increased turnover efficiency of +1.0% per annum between 2010 and 2015, and +1.5% per annum post 2015
[2] Assumes constant market share within the Study Area
At 2007 prices

36. Table 10 below converts the identified comparison goods expenditure residual to a floorspace requirement, based upon the differing trading performance of potential end operators. By applying sales densities of £3,000 per sq.m and £5,000 per sq.m to the identified surplus expenditure and allowing for increases in the productivity of existing floorspace, it is

estimated that by 2015 there will be a requirement for an additional 2,232 sq.m to 3,721 sq.m of net floorspace, depending on the format of the floorspace and assuming Shrewsbury's current market share is maintained. Again, as demonstrated by the below Table 10, the requirement rises sharply to between an additional 30,447 sq.m and 51,506 sq.m of net floorspace by 2021, and to between an additional 48,975 sq.m and 82,849 sq.m of net floorspace by 2026, by which time increases in comparison goods expenditure are forecast to be significant.

Table 10: Quantitative Need for Additional Comparison Goods Floorspace in Shrewsbury

Year	Comparison Goods		
	£m	Floorspace Requirement (Net)	
		Min[1*]	Max[2*]
2010	0.00	0	0
2015	12.02	2,232	3,721
2021	189.73	32,214	54,496
2026	328.86	51,065	86,385

[1] Average sales density assumed to be £5,000 per sq.m
[2] Average sales density assumed to be £3,000 per sq.m
At 2007 prices

37. It is estimated that existing commitments could account for around £49.45m of the capacity identified.

Future Opportunities for Accommodating Growth

38. In order for future planning policy, strategy and decision making to respond to the additional floorspace requirements identified, it is necessary to consider where future growth should be directed.

Future Need for Convenience Goods Floorspace

39. This report identifies that there will be a need for additional convenience goods floorspace through to 2026 within Shrewsbury. Whilst a significant part of this need will be driven by forecast increases in population and expenditure, it is evident that a need could arise in the short-term to address current overtrading, which has been identified in some of the key stores within Shrewsbury.

40. From a qualitative perspective, it is evident that Shrewsbury is well represented and contains all of the four major food operators (Sainsbury's, Tesco, Asda and Morrisons) which is reflected by the high convenience goods market share that is achieved within the primary catchment area. Whilst it is evident that Shrewsbury's sub-regional role will primarily be focussed on comparison goods and leisure facilities, there would appear to be a qualitative

need to improve the convenience goods facilities within Shrewsbury Town Centre to complement the strong comparison goods offer that exists at present.

41. At this stage, there would appear to be one clear potential opportunity, which involves the redevelopment of the Riverside Shopping Centre linked to the improvement and reconfiguration of both the Pride Hill Shopping Centre and the Darwin Shopping Centre. We are aware that developers/investors are currently examining the future feasibility of redeveloping the Riverside Mall, which has been identified now for sometime as the most likely major retail development opportunity within Shrewsbury Town Centre. Given the likely scale of development that could be accommodated on this site, there is potential for a new foodstore to be provided as one of the key anchors/attractors which would clearly enhance the viability and deliverability of any comprehensive retail led regeneration of this site. Beyond this potential opportunity, it is difficult to see where else within the existing primary shopping area further convenience goods floorspace could be delivered.

Future Need for Comparison Goods Floorspace

42. Unlike the need identified for future convenience goods floorspace, the need for comparison goods floorspace is clearly driven by the forecast growth in expenditure and population. However, it is important to note that as a result of the current recessionary period, the forecast growth in expenditure over the next five years is significantly reduced compared to the figures utilised in the previous 2003 study. In fact, over the next few years, it is anticipated that the average spend per person on comparison goods will actually decline. Thereafter, it is forecast that growth in expenditure will return and as a result, there will be a considerable need for comparison goods floorspace in the medium to long-term.

43. As a result, the need for future comparison goods (after allowing for current commitments) is clearly less pressing or urgent than the current overtrading identified within the convenience goods sector.

44. However, it is evident that there is a qualitative deficiency within Shrewsbury Town Centre in relation to the major national multiple retailers and there is a significant opportunity within Shrewsbury Town Centre to reconfigure and redevelop the three main shopping centres (which are now all in one ownership) to provide a retail offer more appropriate to a sub-regional shopping destination. Without wishing to pre-judge the outcome of the Regeneration Framework exercise, which is currently being undertaken by consultants Broadway Malyan, it is evident, from our knowledge of Shrewsbury Town Centre, that the most obvious opportunity for such comprehensive redevelopment would be focussed on the Riverside Mall, the adjoining multi-storey car park, and the existing bus station. Whilst any

potential redevelopment within Shrewsbury Town Centre will be highly complex given the constraints of the topography and river, and any potential impact on traffic movement through the town centre, we believe that a comprehensive redevelopment scheme could be delivered at the Riverside/Raven Meadows area in the medium to long-term (2015 to 2026).

45. Clearly, in the current economic climate, we would not expect a scheme to be delivered in the short-term (i.e. the next five years). However, the Council should use the next five years carefully to plan for and encourage (in partnership with the current owner) the redevelopment of this area for a comprehensive retail and leisure development.

46. Without such a comprehensive redevelopment opportunity, it is evident that Shrewsbury will be faced with increased pressure for retail development in out-of-centre locations which, whilst maintaining Shrewsbury's market share within the sub-region, will do little to enhance the vitality and viability of the established town centre. The only way the Council can protect the town centre against such development in the medium to long-term is to act proactively and to target resources efficiently whereby the potential regeneration of the Riverside/Raven Meadows area is given the best possible opportunity to succeed.

Strategy Recommendations

47. In order to provide a robust strategy that can be defended in the medium to long-term, it will be essential that this document should form part of the Council's LDF process, whereby the recommended approach is rooted in development plan policy. As a result, the Council may consider the preparation of further guidance to support Shrewsbury's town centre strategy, which could take the form of a SPD (Supplementary Planning Document), an AAP (Area Action Plan), or a range of development briefs. This can build upon the work already undertaken as part of the Regeneration Strategy and set out clear spatial priorities for future retail and leisure development. It will be fundamental that the LDF process demonstrates how opportunities within Shrewsbury Town Centre can meet the anticipated needs identified within this study, and why such an approach will help underpin the future vitality and viability of the centre. With this policy document in place, not only will future retailers and developers be able to understand the Council's objectives and priorities for development, but it will also help the Council to better control the future expansion and development of retail and leisure floorspace in locations that may prove harmful to this strategy, or undermine the future vitality and viability of Shrewsbury Town Centre as a whole.

Future Retail Policy

48. PPS4 requires local planning authorities, as part of their economic vision for their area, to set out a strategy for the management and growth of centres over the plan period. As part of their strategy, local planning authorities should: define a network and hierarchy of retail centres; define the extent of town centre and their primary shopping area; and, consider floorspace thresholds for the scale of edge-of-centre and out-of-centre development for which planning applications should be accompanied by an impact assessment.

Hierachy

49. The Shropshire Core Strategy Final Plan Publication document was placed on consultation between 15 February and 29 March 2010, and was formally submitted to the Secretary of State on 30 July 2010. The Publication document sets out at Policy CS15 the proposed hierarchy of town and rural centres, which can be summarised as follows:

- **Strategic Centre:** Shrewsbury;
- **Market Towns:** Oswestry, Market Drayton, Whitchurch, Ludlow and Bridgnorth; and
- **Key Centres:** Albrighton, Bishops Castle, Broseley, Church Stretton, Cleobury Mortimer, Craven Arms, Ellesmere, Highley, Much Wenlock, Shifnal, Wem, and the combined key centre of Minsterley and Pontesbury.

50. WYG considers the hierarchy proposed by the Core Strategy Final Plan Publication document to be appropriate and considers that the wording of Policy CS15 makes appropriate provision to direct significant town centre provision to Shrewsbury Town Centre.

Primary Shopping Area

51. Shropshire Council will define the extent of the Primary Shopping Area through the Site Allocations and Management of Development DPD (SAMDev). The existing Primary and Secondary Frontages and Primary Shopping Area (as defined by the adopted Shrewsbury and Atcham Local Plan Proposals Map) have been reviewed as part of this study. WYG recommends that the existing Primary Frontages are amended so that:

- numbers 17 to 25 High Street – which comprise a mix of uses, but few retailers – become Secondary rather than Primary Frontage; and
- the Darwin Shopping Centre, Pride Hill Shopping Centre and Riverside Shopping Mall are all defined as Primary Frontages.

52. We recommend that amendments are made to Secondary Frontages by:

- creating new Secondary Frontages along St Mary's Street, Dogpole, Milk Street, Princess Street, Market Street, St John's Hill, Barker Street, Hill's Lane and Rousehill; and
- reducing the extent of the Secondary Frontage along Wyle Cop.

Thresholds

53. In accordance with guidance in PPS4, it is appropriate to identify thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment. For a centre of the size of Shrewsbury, performing the role that it does, it is recommended that development proposals providing greater than 500 sq m gross floorspace for town centre uses in an edge or out-of-centre location should be the subject of an impact assessment. It is considered appropriate to reduce the threshold for district centres to 300 sq m gross and for local centres to 200 sq m gross. In our experience, it will only generally be development of a scale greater than these thresholds which will lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of PPS4.