TAMWORTH TOWN CENTRE & RETAIL STUDY 2024 – EXECUTIVE SUMMARY
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04 FEBRUARY 2025

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FIRSTPLAN FOR TAMWORTH BOROUGH COUNCIL

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Broadwall House
21 Broadwall
London SE1 9PL

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

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Broadwall House
21 Broadwall
London SE1 9PL

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

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

2 The full report is referred to as the **Tamworth Town Centre & Retail Study 2024;** this report provides an Executive Summary of its key findings. The study acts as a full new evidence base study in respect of retail and town centres and is supported by new empirical evidence. The Council's last retail and town centres evidence base study was completed in 2011 (referred to hereafter as 'the 2011 Study').

3 The study identifies the current challenges facing town centres, and the opportunities to deliver healthy, diverse and vibrant centres over the course of the new Local Plan period. It also identifies where residents in the Borough are currently undertaking their shopping and commercial leisure visits, and provides a quantitative and qualitative assessment of the future retail and commercial leisure needs which the Borough will need to plan for.

4 Our study has been informed by a mixture of on-site and desk-based information gathering, including site visits to Tamworth town centre and the network of other centres, namely nine local centres and 15 neighbourhood centres. Further evidence is provided by way of a household telephone survey of shopping and leisure patterns across the Borough, as well as adjacent surrounding areas where residents may look towards facilities in the Borough to meet their shopping and leisure needs.

Planning and Legislative Context

5 Careful consideration has been applied to the preparation of this study in regard to relevant planning policy including the National Planning Policy Framework (NPPF) and the Tamworth Borough Council Local Plan (2016). The Review of the Tamworth Borough Council Local Plan (2020) and the Local Plan 2043 Issues and Options Document (2022) are also of relevance.

6 This study has also taken into account key changes in planning legislation, most significant is the amendments to the Use Classes Order which came into effect in September 2020. Of these, the most pertinent are introduction of three new use classes; class E, class F1 and class F2, which collectively have been designed to allow for a greater range of flexibility in the range of uses which can be accommodated in town centres without requiring planning permission.

7 The introduction of use class E can be considered highly significant not only for town centres but for all retail locations. It means that a commercial unit which was, for example, formerly in class A1 retail use, can now change to a cafe or restaurant use (formerly class A3) without requiring planning permission for change of use, unless a specific restrictive condition applies. This provides town centres and other retail locations with the opportunity to respond more flexibly to changes in demand from different types of uses/operators. However, the introduction of class E applies to all locations - i.e. it is not just applicable to town centres. This means there is scope for retail parks and other non-town centre locations to benefit from the additional flexibility afforded by class E. Also of significance is an amendment which was made to Permitted Development Rights which allows for the change of use from Class E properties to residential from August 2021, known as 'Class MA'.

Local Context

8 Tamworth Borough Council has secured a £21.65 million investment from the Government's Future High Streets Fund in 2020. When combined with funding from external partners, the Council have a total of £40 million to invest in schemes to support the improvement and enhancement of Tamworth town centre. A number of schemes are currently underway across the town centre, as summarised below:

- **College Quarter –** The majority of the former Co-operative Society Department Store located adjacent to St Editha's Square is currently being redeveloped to provide a new Tamworth College. The scheme gained planning permission in January 2023 and has capacity for up to 1,500 students. Construction is underway and is expected in open in the summer of 2025.

- **Enterprise Hub –** This scheme comprises the redevelopment of the part of the former Co-operative Society Department Store which faces onto Colehill. The site gained planning permission in July 2022 to refurbish the former store to provide 15 hybrid office/business units. The purpose of the scheme is to provide flexible working space which supports small businesses and enterprise. Construction of the scheme has already commenced.

- **Middle Entry refurbishment –** Middle Entry is a walk through leading onto St Editha's Square and contains a collection of retail units. In October 2022, planning permission was granted for a redevelopment scheme which includes removing the glazed roof and the golden bridges at either end of the Middle Entry, to open up views of St Editha's Church and the Town Hall. A further aspect of the scheme involves the demolition of a collection of vacant units facing onto Market Street to provide a new multi-use building and public realm improvements, including tree planting and benches.

- **Castle Gateway –** The Castle Gateway project involves creating an improved entrance between the town centre and the Tamworth Castle Grounds by enhancing the Castle Gatehouse area and adjoining Market Street properties. The scheme secured planning permission in December 2024.

9 The location of the various regeneration projects linked to the Future High Street Fund is shown below.

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

Retail and Commercial Leisure Market Context

10 The retail and leisure sectors are dynamic and fast-moving, and heavily influenced by external economic factors, particularly prevailing economic conditions which can cause consumers to limit spending and developers and retailers to be more cautious in taking space. There have been a number of significant changes in the sector since the 2011 Study, whilst the impact of Covid-19 on shopping patterns is also clearly a significant consideration. The key changes can be summarised as follows:

- **Convenience (food) goods sector:** In the convenience sector**,** the main trend in recent years has been the continued rise in popularity of the discount retail sector, headed by Aldi and Lidl. The success of these stores has increased significantly over the course of the last decade, with their popularity initially having been boosted during the 2008 financial crisis. This has become particularly amplified in recent years as both companies step up store expansion programmes and claim greater levels of 'market share' at a time when much of the population is becoming increasingly cost-conscious and switching to the use of these stores for at least an element of their shopping. There are currently three Aldi stores and two Lidl stores in Tamworth, as evidence of their recent growth, and we would expect further demand for stores from these operators to potentially come forward in the short to medium term.

- **Comparison (non-food) goods sector:** In terms of comparison goods shopping, the changes affecting town centres have arguably been more pronounced in the past five years than at any time previously. The loss of BHS department stores from town centres at the end of 2016 has been followed by the closure of Debenhams stores and Arcadia Group, which owned long-established high street retailers such as Topshop, Topman, Dorothy Perkins, Evans and Burton. The most recent high-profile casualty has been the administration of the household goods retailer Wilko (who operated two stores in Tamworth) in August 2023 which resulted in all of the retailer's near-400 stores closing. The closures of Wilko stores have left voids of large retail units in town centres of varying sizes, but in particularly market towns and smaller town and district centres where Wilko stores often performed a significant 'anchor' role.

- Whilst many comparison goods retailers have been downsizing their store portfolios for a number of years, as online shopping has meant there is less of a need for an extensive network of physical retail stores. The closure/downsizing of the operators mentioned in the paragraph above has arguably had the most 'visible' impact on affected towns and city centres, as the units occupied are large-format retail spaces, often anchoring a shopping centre or high street, and therefore their vacancy can often be highly prominent. The challenge for town centres is, owing to the changes in shopping patterns and continued uptake of online shopping, in many cases there is a lack of demand from operators wishing to take some or all of the space, and therefore the units are — in many locations — proving difficult to let.

- In such instances, landlords and/or shopping centre owners are increasingly looking for ways to diversify the offer in order to let the space, including subdividing the unit into a parcel of smaller units; introducing additional food & beverage, leisure or complementary facilities; or in some cases converting upper levels to offices or even residential uses. It is important to emphasise that these changes were well underway before the Covid-19 pandemic, but the pandemic has undoubtedly served to accelerate the pressure for this diversification to take place.

- **Growth in role of the commercial leisure sector:** the commercial leisure sector is becoming a more significant contributor to the vitality and viability of town centres at all levels. This is because many town centres are finding an over-supply of floorspace traditionally used for retail purposes, as changing patterns of consumer behaviour (and specifically the growth of online retail) have reduced demand for 'bricks and mortar' retail floorspace. At the same time, interventions such as the introduction of class E have provided opportunities for a broader range of sectors to step in and make use of this surplus floorspace stock. We expect that the commercial leisure sector will continue to make an increasing contribution to the overall 'offer' and vitality of town centres over the course of the Council's new Local Plan period.

- **Online shopping:** the Covid-19 pandemic accelerated the influence of online shopping over the shopping patterns of consumers in the UK, significantly amplifying the rates of online shopping which were already taking place, particularly in respect of comparison goods shopping. Online shopping will continue to act as a 'claim' on total available spending on both comparison and convenience goods over the course of the Council's new Local Plan period, and evidence from the household survey indicates that online shopping is above the UK average for both comparison and convenience goods in the survey area.

- **Usage of town centres:** the main beneficiaries of the Covid-19 pandemic in respect of shopping patterns have been local town centres and locations such as market towns, district and local centres, as — aligned with an increased usage of online shopping channels (as discussed above) — people reduced travelling to 'high order' centres for shopping and directed their spend towards more local shopping facilities.

Findings of Tamworth Town Centre Health Check

11 The study provides a detailed assessment of the performance of Tamworth town centre against the 'town centre health check' indicators set out at paragraph 006 of the 'Town Centres & Retail' Planning Practice Guidance ('PPG') (as amended, 2020). The purpose of the indicators is to provide an understanding of the 'vitality and viability' of the town centre and include measures such as identifying the diversity of uses within a centre, retailer representation, vacancy rates, pedestrian flows, accessibility, perception of safety and occurrence of crime, state of town centre environmental quality, and customers' experience and behaviour.

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

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

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

15 The strengths and weaknesses of Tamworth town centre are summarised below:

Key strengths	Key weaknesses
• Ongoing regeneration projects will diversify town centre and help generate additional footfall. • Good range of day to day shopping facilities. • Presence of Castle / Grounds and Tamworth Park are a significant asset. • Strong independent sector (both retail and leisure). • Market adds diversity and is a footfall generator. • Good levels of accessibility. • Good environmental quality and historic nature of town centre.	• Vacancy rate is high (18.5%) and presents cause for concern. • Duplication in much of the retail offer – discount stores, charity shops. • Absence of larger supermarket. • Both retail and leisure offer is generally downmarket and would benefit from greater diversification. • Key leisure assets including the Odeon cinema, Snowdome indoor ski centre and Namco Funscape are detached from wider town centre offer.

Local & Neighbourhood Centres

16 A further component of this study was to provide an analysis of the network of nine local centres and 15 neighbourhood centres across the Borough. The role and function of these centres is to meet essential day to day needs of a localised catchment, the majority of whom would be expected to walk to the centre. Given the small size of the neighbourhood centres (which in some cases comprise just two units), full health check assessments were not carried out.

17 The key objective of the analysis is to identify the ability which each of the centres has to respond to local residents' essential day to day shopping and services needs. In order to gain an understanding of this, following our obtaining the latest schedule of uses in each centre, we distilled this data into a benchmarking exercise, to establish the extent of representation of 15 'key facilities' in each of the local and neighbourhood centres. Key facilities include the presence of a supermarket; small convenience store; newsagent/off licence; other convenience outlets (e.g. bakery, greengrocer, international foods); post office; pharmacy; ATM; laundrette/ dry cleaners; public house; café; take-away; hairdressers/beauty salon; GP surgery, dentist and library.

18 A scoring matrix has been applied on the basis of how many of the 15 aforementioned key facilities the centres achieve, this was only applied to the local centres given that a number of neighbourhood centres had five or less units. From the analysis we draw the following conclusions:

- It is considered that the north-west section of the Borough is well provided for, containing two local centres as well as two neighbourhood centres. Both **Fotenaye Road, Coton Green** and **Masefield Drive, Leyfields** are located in this particular area, contain nationally operated convenience stores, post offices along with hairdressers.

- In the north-eastern part of Tamworth there are extensive suburban areas which do not benefit from being in proximity to either local or neighbourhood centres, and the only centre which is located towards the north-eastern edge of the urban area is relatively limited in terms of the range of facilities it offers. Specifically, we consider the 'triangle' between **Tamworth Road, Armington** and neighbourhood centres **Kerria** and **Pennymoor Road** is an area where improvements in local-scale provision could potentially be beneficial. There are two planned urban extensions which include the provision of local centres to the east of this area which will help improve accessibility to local services in the future.

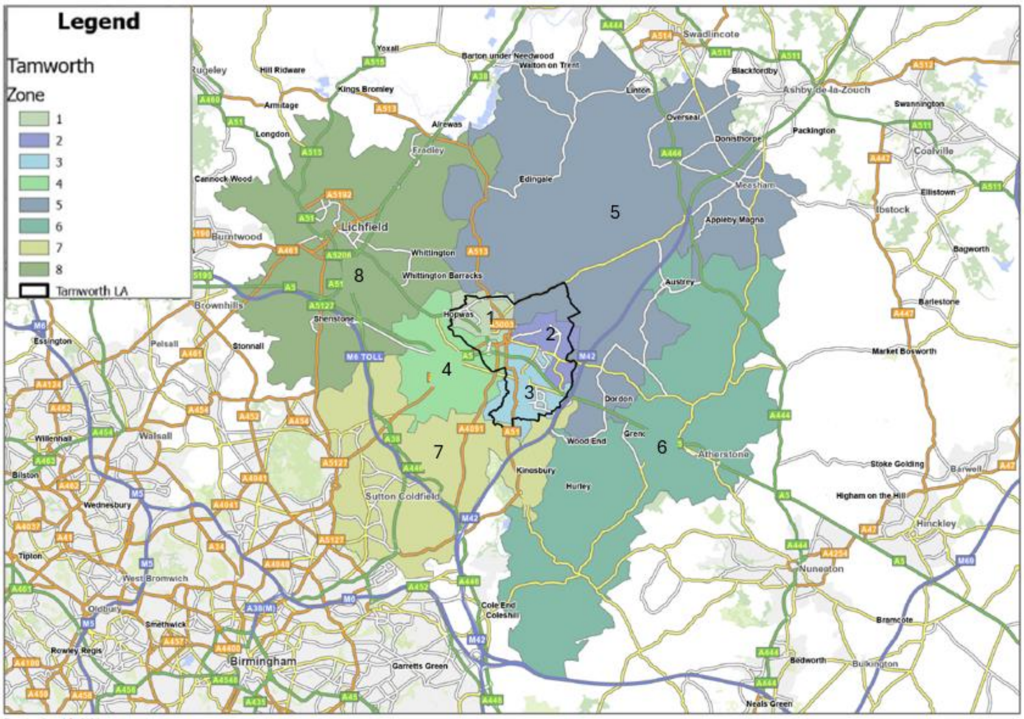
- The south-eastern part of the Borough (Wilnecote area) lacks the provision of a local centre; however this area does contain several neighbourhood centres which are found in close proximity to each other. Collectively, these centres enable generally sustainable patterns of shopping and access to local facilities with provision of multiple convenience stores and other local and leisure uses.

Household Telephone Survey

19 In order to accurately capture the impact of the key changes in the retail and commercial leisure sectors (discussed further below) and gain a clear understanding of where residents of Tamworth Borough and its surrounding catchment are visiting for their shopping and leisure trips, as identified above, a new telephone survey has been undertaken in support of the study. The survey captures patterns of shopping for comparison goods (non-food), convenience (food) goods, different types of commercial leisure activity (such as dining out, visiting cinemas, entertainment venues and so on), as well as identifying how residents use Tamworth town centre. The survey also captures the proportion of local residents' spending on comparison and convenience goods which is spent online. The survey was developed in collaboration with the Council and undertaken by a specialist market research consultancy, NEMS Market Research. The telephone survey is a critical component in informing both our qualitative understanding of how Tamworth town centre is performing, as well as the quantitative 'need' for new retail floorspace over the Council's new Plan period which this study seeks to identify.

20 The overall survey area, as shown in **Figure 1**, has been divided into eight different survey zones, in order to accurately identify local patterns of shopping across different parts of the survey area. Tamworth town centre falls within zone 1, with the majority of the wider Borough covering zones 2 and 3, whilst also covering a smaller proportion of zones 4 and 5[1].

Figure 1 Household telephone survey area



Map source: Experian

21 Approximately 100 telephone surveys were undertaken in each of the eight zones (800 in total). Respondents were contacted across a variety of days of the week and at different times, and respondents' key demographics (e.g. age bracket and gender) were recorded in order to ensure a robust sample of the local population was captured. All respondents surveyed were asked to confirm they were the principal shopper in the household.

22 The new telephone survey sought to identify the shopping patterns of residents in the survey area. For convenience goods, questions were asked on patterns of visits for 'main' food shopping (i.e. weekly/ bulk food shopping trips), 'top up' food shopping (basket/small but frequent purchases) and 'small shops' (visiting specialist local retailers). Regarding comparison goods shopping, questions were asked about shopping patterns about types of non-food goods (i.e. electrical items, recreational goods, clothing and footwear). The telephone survey also identified pattern of commercial leisure activity, asking respondents where they travel for different types of commercial leisure activity such as cafes, restaurants and drinking establishments.

Comparison goods shopping patterns and identification of need

23 A key component of the study is to identify the current shopping patterns for comparison and convenience goods for residents in the study area, and identify the level of 'need' for new floorspace in the Borough for the Council's new Local Plan period. The calculation of 'need' is a technical exercise which is derived from considering three key factors: where residents of the survey area are currently undertaking their shopping; how much population growth is expected to come forward in the survey area; and how much spending on

[1] The urban area of Tamworth Borough is contained within zones 1-4 whilst the part of the Borough covering zone 5 comprises a predominantly rural area.

convenience and comparison goods will increase, having regard to economic forecasts and other factors such as online shopping. A full discussion of these inputs is provided in the main report.

Shopping patterns

24 As shown in **Table 1**, the telephone survey has identified that for residents in the Tamworth area, the collection of retail warehousing and retail parks situated around Ventura Park Road account for the greatest amount of comparison good spend by some margin; together they attract over £275m of comparison goods spend from the survey area, accounting for 39.5% of total available comparison goods spending which is available to residents within the survey area.

Table 1 Main locations for comparison goods shopping in survey area (destinations in Tamworth Borough shown highlighted)

Rank	Centre / Retail destination	Comparison goods spend from survey area, 2024 (£m)	% of total available comparison goods spend
1	**Tamworth — Ventura area retail warehousing^**	**278.6**	**39.5%**
2	Birmingham conurbation — all locations (includes city centre, retail parks, Walsall, Solihull)	77.5	11.0%
3	Lichfield — city centre	50.7	7.2%
4	Sutton Coldfield — town centre	45.5	6.4%
5	**Tamworth — town centre**	**45.0**	**6.4%**
6	Sutton Coldfield — other**	39.7	5.6%
7	Burton-upon-Trent — all locations	26.0	3.7%
8	Swadlincote — all locations	25.1	3.5%
9	Lichfield — other locations	13.9	2.0%
10	Atherstone	9.9	1.4%

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

25 As shown in **Table 1**, the second most popular destination is Birmingham, accounting for £77.5m of comparison goods spend. This figure is a combined figure for the Birmingham conurbation and whilst approximately one-third of this figure is accounted for by Birmingham city centre (£26.2m), retail warehousing and shopping parks in the Erdington area, on the eastern side of Birmingham, account for £29.0m of spend; in this area there are a number of significant out-of-centre retail facilities such as Fort Shopping Park which includes large branches of Primark, Next and Boots for example.

26 Following this, Lichfield city centre and Sutton Coldfield town centre attract similar amounts of spend from the survey area, at £50.7m and £45.5m respectively; and Tamworth town centre follows this with a comparison goods turnover of £45.0m. The comparison goods turnover of Tamworth town centre is therefore approximately 20% of that of the Town's retail warehousing, confirming that in relative terms the town centre performs a significantly more limited role and function as a comparison goods shopping destination[2].

[2] Tamworth town centre accounts for £45.0m of comparison goods spending or 7.2% of the total spend, which is significantly lower than retail warehousing area that is located around Ventura Park Road.

Identification of comparison goods capacity

27 Having undertaken the assessment of shopping patterns and trading performance, we set out the quantum of comparison goods floorspace which the Council should seek to plan for over the period to 2040. The forecasts are based on a 'constant market share' approach, assuming that current patterns of comparison goods shopping (as identified by the telephone survey) will remain unchanged over the course of the Plan period.

Table 2 Estimated comparison goods floorspace need for Tamworth Borough, 2024-43

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

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

Convenience goods shopping patterns and identification of need

28 The approach to the calculation of convenience goods need largely reflects that used to calculate comparison goods need, as set out above.

Shopping patterns

29 Convenience goods shopping is a more localised activity – a type of shopping where residents are more likely to use the facilities close to their home, rather than actively seek to travel a longer distance to visit a particular store. Consequently, it means that catchments typically retain a greater proportion of convenience goods market share than for comparison goods.

30 Unlike for comparison goods shopping, there is relatively little merit in looking at aggregate shopping patterns across the survey area as a whole, given the more localised nature of convenience goods shopping. The most popular convenience goods shopping destinations by zone is shown below in **Table 3.**

Table 3 Most popular convenience goods shopping destinations by zone (Tamworth Borough zones only)

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

Source: Telephone survey results

31 **Table 3** shows that residents across all four of the Tamworth zones benefit from access to a good variety of convenience shopping facilities; this can be evidenced by the fact that no single foodstore in any of the four zones has a 'dominant' market share from its local zone. The Sainsbury's store at Ventura Park Road is the most popular main food shopping destination for residents in three of the four Tamworth zones but exerts much less of an influence over residents in the south of the town, where the Morrisons store in Wilnecote attracts over 25% of the market share from residents in this zone. Overall, we consider the provision of food shopping facilities across the Borough to be generally strong.

Identification of need

32 **Table 4** shows that there is no requirement for additional convenience goods floorspace over the period to 2034, with our capacity modelling identifying an oversupply of convenience goods floorspace of -1,600 sq.m net by 2034, reducing slightly to an indicative figure of -1,400 sq.m net by 2040.

Table 4 Estimated convenience goods floorspace need for Tamworth Borough, 2024-43

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

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

33 For both the comparison and convenience goods needs forecasts, it is considered that these figures should be subject to review in due course, and needs beyond 2034 should only be considered indicative. It should be noted that the lack of identified capacity should not mean that the council imposes a moratorium on new floorspace in the Borough, particularly in instances where proposals are of an appropriate scale and have potential to enhance the vitality and viability of the network of centres. Applications should be considered on their merits and, where appropriate, compliance with the sequential and retail impact policy tests.

Commercial leisure assessment

34 The commercial leisure sector is becoming a more significant contributor to the vitality and viability of town centres at all levels. This is because many town centres are finding an over-supply of floorspace traditionally used for retail purposes, as changing patterns of consumer behaviour (and specifically the growth of online retail) have reduced demand for 'bricks and mortar' retail floorspace. At the same time, interventions such as the introduction of class E have provided opportunities for a broader range of sectors to step in and make use of this surplus floorspace stock.

Summary of commercial leisure assessment

35 The household survey results identified that:

- Tamworth town centre is the second most popular destination for visiting restaurants, accounting for 14.9% of the market share across the survey area, following Lichfield city centre which accounts for 20.5% of the total market share. The centre attracts a market share of between 25.5% and 36.8% from its four 'local' zones (zones 1-4), which can be considered acceptable, but by contrast Lichfield attracts a peak market share of 63.8% from its 'local' zone, zone 8, suggesting that in Lichfield more residents are dining out locally than is the case with Tamworth.

- Tamworth town centre is the most popular destination for visiting cafes, accounting for 23.9% of the total market share. Across the Tamworth zones, Tamworth town centre accounts for between 49.7% to 39.6% across the 'local zones'. As the most popular destination for visiting cafes in the wider survey area, Tamworth town centre draws good amounts of trade from residents outside of the Borough and overall performs strongly in terms of market share.

- Tamworth town centre is the most popular destination for visiting pubs and bars, accounting for 19.4% of the total market share across the survey area. Lichfield city centre is the second most popular destination accounting for 15.7%, followed by Sutton Coldfield town centre. Tamworth town centre attracts a market share of between 56.5% and 33.5% of the four 'local' zones, therefore securing over one-third of the market share from each of the local survey zones. We consider this to represent a reasonably strong position (particularly from zone 1), but again one with scope for some improvement.

- Regarding visits to arts & culture venues, Birmingham city centre is the most popular destination accounting for 34.6% of the total market share, which is to be expected given that such facilities tend to be in concentrated larger/regional cities. Tamworth accounts for 9.2% of the market share across the survey area, the principal cultural venue is the Tamworth Assembly Rooms which is a performing arts theatre that has been recently renovated. The theatre accounts for between 21.8% to 10.6% of visits across the four 'local' zones.

- The Odeon Luxe cinema that is located in Tamworth town centre, is by some margin the most popular cinema across the survey area, accounting for 53.3% of total visits to the survey area. The Odeon Luxe is a multiplex cinema of the type usually found on out of town retail and leisure parks, but in Tamworth is located on the south-eastern side of the town centre (within the town centre boundary), albeit it is disconnected from the wider town centre.

- Tamworth town centre contains an unusually strong presence of entertainment venues, including the NAMCO Funscape gaming centre (which features bowling alley, arcade and a soft play area), and the Snowdome indoor skiing centre (which also contains an ice rink and a gym). The presence of facilities culminates in Tamworth having an aggregate market share from the survey area of 47.0%, i.e. accounting for almost one in two visits to all entertainment venues for residents in the survey area. This can clearly be considered a positive performance.

Commercial leisure expenditure projections

36 By applying the Experian population projections we have adopted for the retail capacity forecasts to the latest per capita expenditure data on leisure spending, we can obtain an indication of the likely growth in leisure spending available to residents of the survey area. Whilst not all of this available expenditure can, by default, be used to support the development of new commercial leisure facilities in the survey area – particularly because leisure spending is often undertaken with holidays, day trips, special occasions and so on and therefore may in part be spent outside the survey area – it provides an indication of the scope for additional development to be supported, thus supporting our qualitative observations in respect of the performance of the centres set out above.

Table 5 Expenditure growth in key commercial leisure categories

Sector	Expenditure growth in survey area, 2024-34 (£m)	Expenditure growth in survey area, 2024-40 (£m, indicative)
Cultural services	+£18.9m	+£29.5m
Recreation & sporting services	+£8.4m	+£13.2m

Restaurants and cafes	+£75.4m	+£117.7m
Total	+£102.7m	+£160.4m

Source: Table CL3a, CL3b, CL3c, CL4, Appendix 3

37 **Table 5** shows that spending growth in the commercial leisure sector is expected to increase by £102.7m in the survey area between 2024 and 2034, and indicatively by £160.4m between 2024 and 2040. Almost three-quarters of this growth in commercial leisure spending (73.4%) can be attributable to the restaurants and cafes sector (which also includes other forms of food and beverage premises, such as pubs/bars), suggesting there is considerable expenditure capacity to support additional facilities of this nature across the Borough.

Conclusions & overarching recommendations

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

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

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

to plan for additional provision of this nature. Accordingly, proposals which seek to deliver additional floorspace of this nature should be supported in principle provided amenity, retail policy and other relevant considerations are met. Proposals for additional commercial leisure provision should be directed towards Tamworth town centre.

- The Ventura Retail Warehousing is likely to be the default choice for shopping for many residents of the Borough. Its 'market share' appears to have grown since the Council's last retail study in 2011, and it has a shopper catchment that extends significantly wider than that of the town centre. There have been a number of enhancements to the offer at Ventura since the last retail study, including new floorspace and modernisation of existing floorspace stock, which appears to have cemented and grown its market share.
- It is understood that much of the Ventura Retail Warehousing floorspace trades as open class A1/E, and in practical terms this limits the scope to which the Council can control its trading impacts vis-à-vis the town centre. However, we would recommend that the Council has clear development management policies in place which resist the creation of smaller-format units at Ventura, i.e. of the type which will more directly compete with the town centre offer.

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