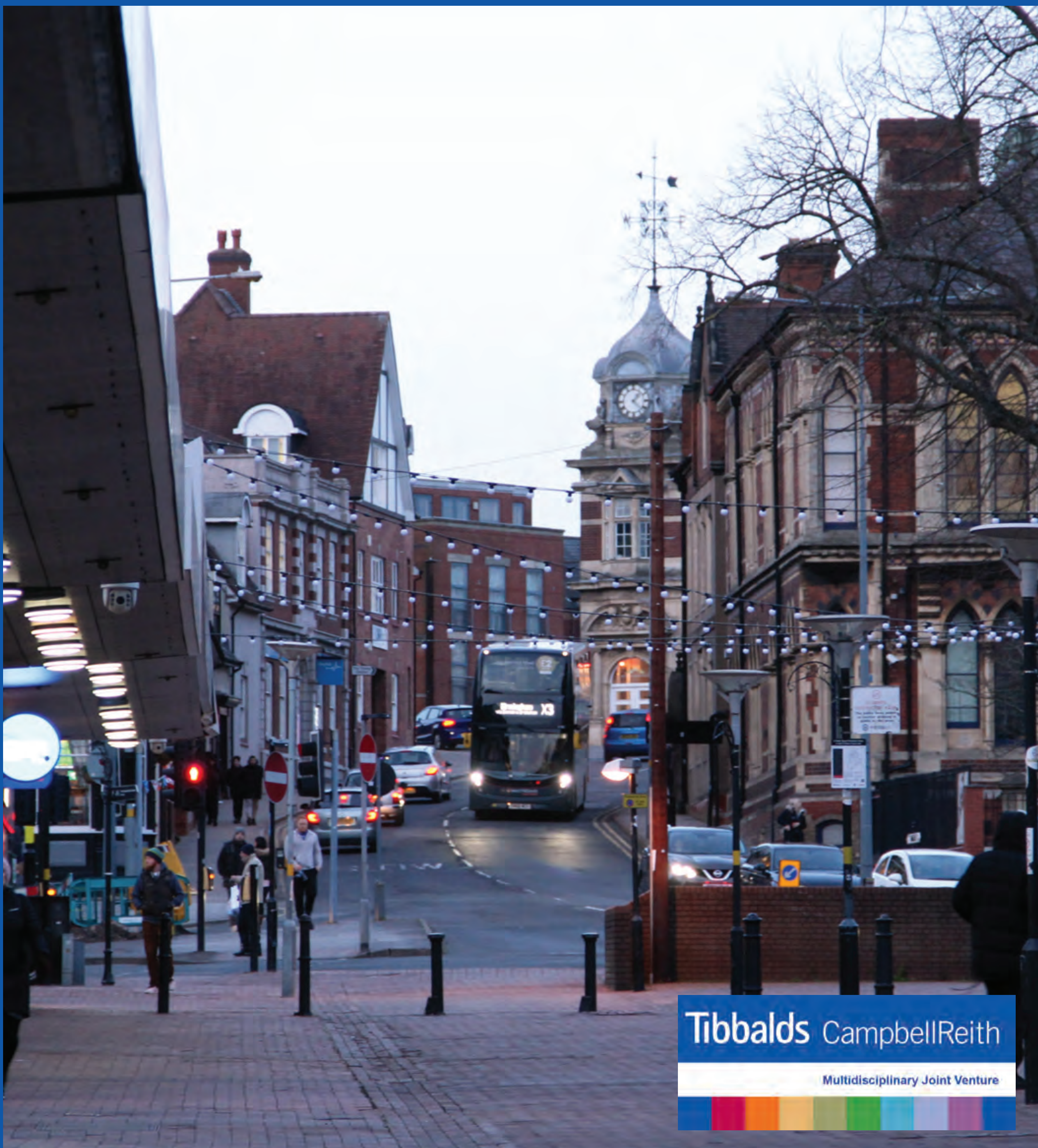
Sutton Coldfield Town Centre Masterplan

Baseline Report (December 2019)



Tibbalds CampbellReith

Multidisciplinary Joint Venture


THE
ROYAL TOWN
OF
SUTTON COLDFIELD

Contents

1 Introduction

This baseline report has been prepared by Tibbalds for the Royal Sutton Coldfield Town Centre Regeneration Partnership to support the development of the Sutton Coldfield Town Centre masterplan.

This report represents a summary of the background research undertaken by the consultant team and sets out our informed understanding of the town centre, its context, and the key constraints and opportunities for positive regeneration. These findings will support and feed directly into the development of the Royal Sutton Coldfield Town Centre vision and masterplan, as the next stage of the project.

1.1 Brief

Birmingham City Council, in collaboration with Royal Sutton Coldfield Town Council (RSCTC), issued a brief for the Sutton Coldfield Masterplan Stage 1 in Autumn 2019. The Town Council's Strategic Plan (2017-2019) identifies the regeneration of the town centre as a corporate priority, and identified the purpose of the masterplan to:

- Provide a bold and ambitious vision .. that unites stakeholders
- Identify the impacts, influences, constraints, consequences and opportunities for the town centre
- Present deliverable transformational place-making projects / opportunities
- Provide confidence to private sector developers, investors and businesses to commit long-term to the town centre
- Build on existing local planning policy
- Acknowledge the financial implications of any proposed interventions

The masterplan project is being led by the Royal Sutton Coldfield Town Centre Regeneration Partnership (TCRP) and is funded by Greater Birmingham and Solihull Local Enterprise Partnership (GBLSEP) and RSCTC (refer to section 2.2 Governance for further details).

1.2 Baseline methodology

The first element of work was to "identify the impacts, influences, constraints, consequences and opportunities", culminating in this Baseline Report. To assess the current situation within Sutton Coldfield Town Centre, the consultant team carried out a range of tasks to establish a baseline understanding and position. These tasks included:

- Site visits and review of the growth and history of the town;
- Planning policy review;
- Market research across economic sectors;
- Retail surveys and a subsequential retail analysis;
- Urban design analysis;
- Transport review; and,
- Stakeholder and landowner discussions, including meetings and workshop sessions with the TCRP.

1.3 Team

The consultant team consists of:

Tibbalds Planning & Urban Design: a multidisciplinary team of architects, planners, and urban designers with strengths in unlocking complex areas, working collaboratively and bringing design and planning together

SQW Land & Property: experts in providing specialist land and property services, to create and deliver successful and viable developments

Urban Movement: experienced transport planners, landscape architects, traffic engineers, and urban designers who thrive on the complexity of urban environments.

The Retail Group: who play an integral role in defining the opportunities and challenges that the town centre is currently facing.

The consultant team

View from Vesey Gardens towards High Street

2 Context

2.1 Short history of Sutton Coldfield

Sutton Coldfield has its origins as far back as the Domesday Book (1086), where it was described as a royal manor. The manor of Sutton Coldfield was the subject of an exchange between Henry I and Roger de Newburgh, Earl of Warwick in 1126, and though no manor was mentioned in the exchange, a mill and park were. The manor, however, was known to exist at a location close to the present Manor Drive, south of the town centre.

The town established itself fully in the 12th and 13th Centuries. The holy Trinity Church was located at a prominent location on a hilltop and provided space for a churchyard. The location on the road between Birmingham and Lichfield was significant, and a market established in the space in front of the church on the junction between Birmingham Road and Coleshill Road (agreed by the Crown in 1300).

The settlement established in a semi-planned way until the fifteenth century, with large houses and generous plots along the High Street and Coleshill Street. The land was boggy, the principal waterway – Plantsbrook / Ebrook – being evoked in modern day street names.

John Harman (alias Vesey, hence Vesey Gardens) promoted a renaissance of the town through the sixteenth century, investing in the market and fairs and in civic and cultural buildings, including the grammar school founded in 1527. Many of the sites remain in civic use today. Harman was born in the town in 1462 and used his influence and fortune to benefit it. Sutton Coldfield remained largely agricultural, but increasingly became the habitation of gentlefolk. Some examples of timber framed and sandstone buildings from the seventeenth century still remain in the old town.

Building activity continued to the eighteenth century with the increase in the importance of towns, and Sutton Coldfield continued to be a place where tradesmen, professional men and gentry chose to live. The architecture began to reflect a more classical approach. The first maps of the town, produced in 1765, showed a built-up frontage along the east side of High Street and Coleshill Road and Mill Street visible. The first turnpikes were established in 1807, widening Mill Street.

Vesey Manor, Birmingham Road

The Parade was cut in 1826, a straight course which by passed the former route, Lower Parade. A condition of another exchange of land required a new carriage route from The Parade to Sutton Park to be constructed, this occurring in 1825.

The nineteenth century saw the further development of housing, schools and an enlargement of the cemetery. The mid-nineteenth century saw the arrival of the railway and an expansion of housing as people sought to move out of industrial Birmingham. The branch from Aston saw a substantial embankment built, with a bridge over Park Road and a terminus built on the current station car park. The prospect of wealthy visitors to the town prompted the building of the Royal Hotel – now the Council House – in 1863.

The railway hastened the addition of suburban housing, with Upper Clifton Road and Railway Road and Rectory Road being constructed through the 1860s and 1870s.

The Midland Railway built the Sutton Park line in 1879, with Midland Drive being built to allow a station at Sutton Coldfield Town to be built, though this was a short lived passenger line. The extension from Sutton Coldfield to Lichfield occurred in 1884, widening the bridge at Park Road to take more tracks, but tunnelling under the Sutton Park Line as the changes in topography occurred. The station was gradually closed between 1965 and 1972, but reopened in 1978 as part of the Cross City line, the former goods yard becoming the commuter parking area.

Traffic was a serious problem in Sutton Coldfield from the 1930s, particularly on The Parade, Mill Street and High

Street, which was the main A38. The scheme for the ring road was approved in 1971 and completed in 1977, creating Brassington Avenue and Victoria Road. In 1972, the Sutton Coldfield by-pass opened (the current location of the A38) which relieved some traffic from the town centre. Uncertainties over the road schemes did cause some dereliction and dilapidation in the built environment and some historic buildings were lost.

High Street Conservation Area was proposed in 1968, but designation was delayed until the determination of the relief road route and following the redevelopment of The Parade. The High Street Conservation Area, covering mainly Mill Street and High Street, was designated in 1973.

The borough of Sutton Coldfield was incorporated into the City of Birmingham in 1974.

Today, the town is the largest town centre in Birmingham City Council's area outside of the city centre itself. It has an estimated population of 94,935, of which around 55,633 are of working age (2018). The population has marginally declined in the last decade, notably amongst those of working age, though those over 65 have been rising in number. Those under the age of 15 have also increased, but to a lower extent than the older age groups. The town maintains a reputation for higher living standards within the conurbation, maintaining both higher levels of educational attainment and higher earnings compared to local and national levels.

2.2 Governance

Royal Sutton Coldfield Town Centre Regeneration Partnership

The preparation of the masterplan is being led by the Royal Sutton Coldfield Town Centre Regeneration Partnership (TCRP). The TCRP was launched in mid-2019 for the purpose of promoting and developing a new vision for the town centre.

The partnership is led by Royal Sutton Coldfield Town Council and involves a broad range of local stakeholders including Birmingham City Council, Sutton Coldfield Town Centre Business Improvement District (BID), FOLIO Sutton Coldfield (Friends of Libraries in Our Sutton Coldfield), and Sutton Coldfield Chamber of Commerce. Regional members include Greater Birmingham and Solihull Local Enterprise Partnership (GBSLEP), the West Midlands Combined Authority (WMCA) and Transport for West Midlands (TfWM).

Royal Sutton Coldfield Town Council

Royal Sutton Coldfield Town Council is a relatively new organisation, which forms the first tier of local government. It was formed after a postal consultative ballot in 2015, when the electorate were asked if a Town Council be established for the Parliamentary constituency of Sutton Coldfield within the City of Birmingham? Almost 70% of those who voted were in favour.

The new parish of Sutton Coldfield and a Parish Council came into being on 1 March 2016, with 24 Councillors elected in May 2016. The status of Town Council was adopted at the first meeting of the newly elected Council in May 2016.

The Town Council is funded by a precept which is paid by the residents of Sutton Coldfield, via their Council Tax, to Birmingham City Council and given to the Town Council to commission and provide certain local services. The Town Council's activities include commenting on planning applications within its boundary (as a statutory consultee to Birmingham City Council), engaging in regeneration proposals and developing community services.

The Town Council is currently preparing a revision to its Strategic Plan, and the most important issue to emerge is the regeneration of the town centre, alongside the promotion of Sutton's heritage, greater involvement in major development projects and promoting links to Sutton Park.

Birmingham City Council

The procurement and management of the Sutton Coldfield Town Centre masterplan has been undertaken by Birmingham City Council. Royal Sutton Coldfield Town Council works alongside the City Council which merged with the Borough of Sutton Coldfield in the major government reorganisation of 1974, taking Sutton Coldfield out of Warwickshire.

Birmingham City Council is the most populated local authority area in the country with a population of over one million people. The City Council runs most of the public services within the boundaries. The city centre is close to the middle of the administrative area, with Edgbaston and Selly Oak to the south, and Sutton Coldfield at the northern extent, 7 miles from the city centre.

The City Council (made up of 101 councillors) is the planning authority for the whole of the administrative area and as such prepares forward plans for the use of land. It is proposed that the Sutton Coldfield Town Centre masterplan, when complete, will have sufficient weight to guide development and investment within the town, giving certainty to those with an interest.

Greater Birmingham and Solihull LEP (GBSLEP)

There are three LEPs that are part of the West Midlands Combined Authority (WMCA). The relevant LEP for Sutton Coldfield is the Greater Birmingham and Solihull LEP (GBSLEP) which covers a wide area with Birmingham City Council at the heart, but encompassing southern Staffordshire and northern Worcestershire along with Solihull.

LEPs are voluntary partnerships set up between local authorities and businesses. The stimulus for them came out of the Government's business agenda in 2011, which aimed to develop local economic priorities and lead economic growth and job creation through their establishment. They replaced Regional Development Agencies, which were abolished in 2012.

The GBSLEP prioritises innovation and creative, global connections and the creation of growth and it is a principal funder of the Sutton Coldfield Town Centre masterplan.

West Midlands Combined Authority (WMCA)

The WMCA combines 18 local authorities (including Birmingham City Council) and three Local Enterprise Partnerships (LEP) that work as a devolved region, moving powers from London to the region to be managed locally. The seven constituent authorities are Birmingham, Wolverhampton, Coventry, Solihull, Dudley, Sandwell and Walsall (the remaining 11 are non-constituent authorities).

Devolution was agreed between the region and the Government in November 2015. The WMCA has a role in promoting and enabling a more prosperous region through a region-wide economic and industrial strategy. It prioritises public service reform, productivity and skills, housing and regeneration, the economy and the environment, and produces an annual plan. It operates Transport for West Midlands (TfWM) as a separate arm of the organisation.

The WMCA has an elected Mayor. The current Mayor is Andy Street and his term expires in 2020. His role is as an advocate and ambassador to the region.

2.3 Planning policy

The principal planning policy affecting Sutton Coldfield Town Centre is the Birmingham Development Plan 2031 (adopted 2017) which uses the Sutton Coldfield Regeneration Framework SPD (2009) as a basis for many of the proposals within it. The GBSLEP Towns and Local Centres Framework (March 2019) also plays an important role as it provided the avenue for obtaining funding for the Sutton Coldfield Town Centre Masterplan project. Other relevant planning policy documents include:

- Urban Centres Framework (January 2020); and,
- Langley SUE and Peddimore SPDs (2019).

Transport-related policy includes:

- Birmingham Connected Green (2013) and White Papers (2014), Birmingham's 20-year Mobility Action Plan and the Birmingham Transport Plan (draft January 2020);
- Birmingham Walking and Cycling Strategy (draft June 2019);
- Birmingham Parking Standards SPD (November 2019); and,
- The climate emergency and 'Route to Zero' (R20)

In addition, the separate Conservation Area Appraisal and Management Plans for the High Street and Anchorage Road Conservation Areas provide guidance on heritage issues applicable to Sutton Coldfield Town Centre.

Birmingham Development Plan (January 2017)

Birmingham Development Plan (adopted January 2017)

The Birmingham Development Plan (BDP) sets out a strategy for the city to 2031. During this time, the city is expected to grow by 150,000 people, which means that the plan has to provide for new homes alongside other land uses and quality environments to meet the needs of residents, workers and visitors. The process of preparing the plan began in 2007, and the Examination was held in 2014.

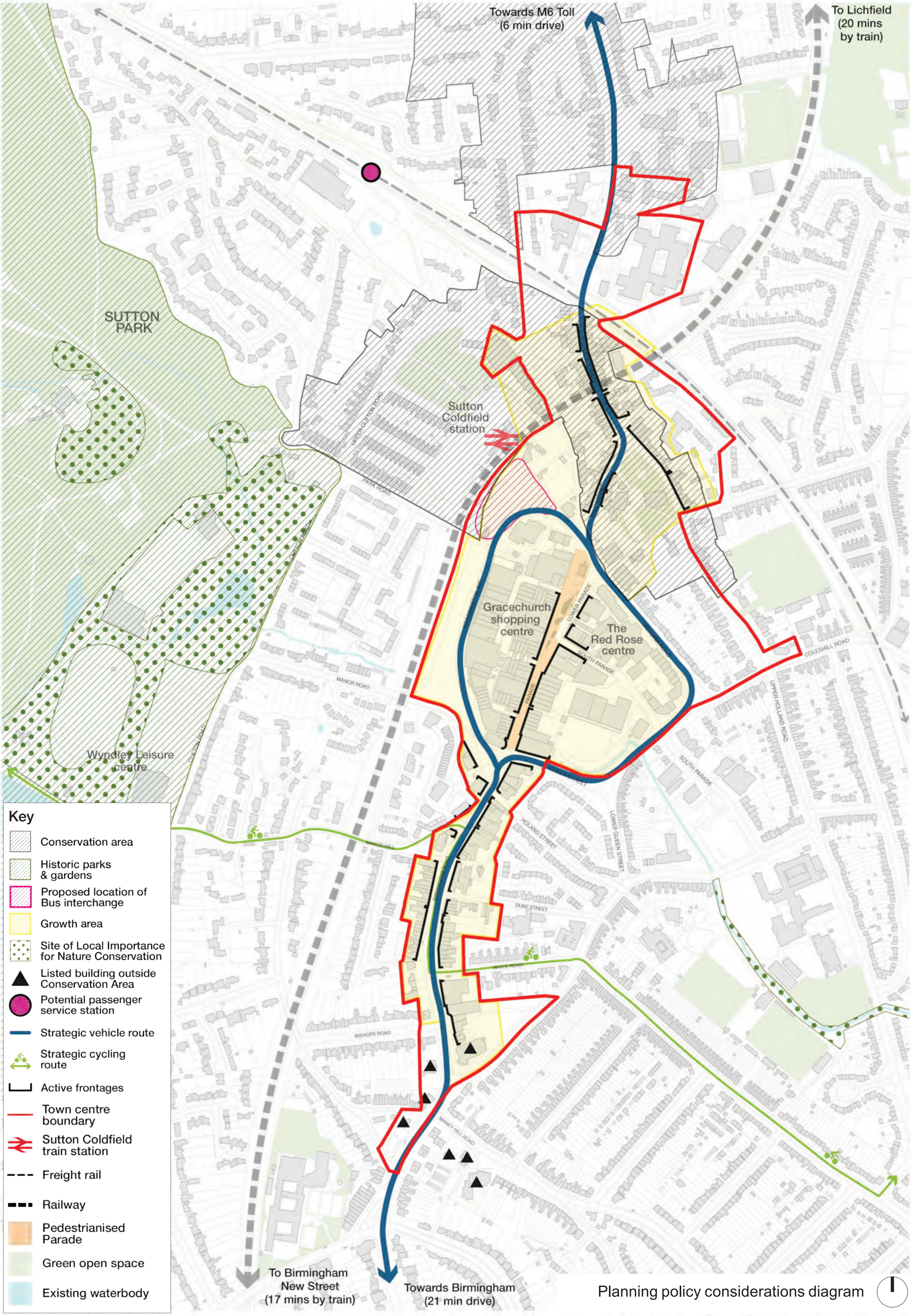
The Big City Plan, a non-statutory document that sets out a vision for Birmingham City Centre, sits alongside the Birmingham Development Plan, and the Plan reflects the aspirations of this.

Birmingham is the largest city in the UK outside of London, is the 'capital' of the West Midlands and has an international reputation. The City is a major employment centre and has economic specialities spanning professional and financial services, digital media, advanced manufacturing, jewellery and environmental and medical technology. Whilst much of the focus of the City Council's area is on Birmingham city centre and its offer, the city has other attractions across it, including Edgbaston Cricket Ground and Sutton Park.

The City has a network of over 70 local centres across it, and Sutton Coldfield is the largest across Birmingham City Council's area. Sutton Coldfield is also acknowledged as one of the city's most pleasant suburbs, known for its attractive, leafy character and proximity to one of Europe's largest open spaces, Sutton Park.

The BDP recognises the major challenges that the city faces in the coming 20 years, including:

- Playing a role in the reduction of the impact of climate change, requiring changes in the approach to development;
- Meeting housing need with affordable homes that integrate with existing communities and avoid overcrowding, accessible to services and jobs;
- Accommodating and delivering long term on limited sites within the dense urban areas;
- Strengthening and diversifying the economy;



Planning policy considerations diagram

- Addressing social issues, including poor health and poverty and addressing worklessness;
- Improving public transport to improve access to jobs and services whilst addressing congestion and improving the scope for cycling and walking locally;
- Responding the national and local changes affecting the retail market;
- Maintaining and enhancing the quality of the built environment and respecting the historic environment;
- Delivering infrastructure through co-ordination with partners and stakeholders;
- Conserving, enhancing and improving the natural environment for people and for wildlife.

The challenges are reflected in the BDP's objectives:

- To develop Birmingham as a City of sustainable neighbourhoods that are safe, diverse and inclusive with locally distinctive character.
- To make provision for a significant increase in the City's population.
- To create a prosperous, successful and enterprising economy with benefits felt by all.
- To promote Birmingham's national and international role.
- To provide high quality connections throughout the City and with other places including encouraging the increased use of public transport, walking and cycling.
- To create a more sustainable City that minimises its carbon footprint and waste, and promotes brownfield regeneration while allowing the City to grow.
- To strengthen Birmingham's quality institutions and role as a learning City and extend the education infrastructure securing significant school places.
- To encourage better health and well-being through the provision of new and existing recreation, sport and leisure facilities linked to good quality public open space.
- To protect and enhance the City's heritage assets and historic environment.
- To conserve and enhance Birmingham's natural environments, allowing biodiversity and wildlife to flourish.
- To ensure that the City has the infrastructure in place to support its future growth and prosperity.

The BDP plans for Birmingham's growth, setting out the overall need in policy PG1. The objectively assessed need for housing over the period is for 89,000 additional homes, though some of this will be delivered outside of the city boundaries. The BDP allows for:

- 51,100 additional homes.
- 2 Regional Investment Sites of 20 and 25 ha and a 71 ha employment site at Peddimore.
- A minimum 5 year reservoir of 96 ha of land for employment use.
- About 350,000 sq.m. gross of comparison retail floorspace by 2026.
- A minimum of 745,000 sq.m. gross of office floorspace in the network of centres primarily focussed on the City Centre.

Policy PG3 of the BDP recognises the importance to the city of high quality design and development, and the potential this can make to creating economically successful, safe and healthy places that people want to live, work and visit. It sets out a series of criteria for good placemaking, including the requirement that development should reinforce character and distinctiveness, create safe places and take opportunities to integrate sustainable design.

Sutton Coldfield is located in the north east of the city, on the edge of the built up area with the green belt between Birmingham and Lichfield / Tamworth further east, Sutton Park to the west and further green space to the east in the form of Rectory Park and Newhall Country Park. It is well connected back to the city by public transport, and to the strategic transport network particularly by the A453 and the A5127, the latter of which forms part of Sutton Coldfield's ring road.

The BDP names it as the largest local centre in the city and, as a sub-regional centre, 'is capable of accommodating significant additional comparison retail floorspace and some office space'. Its place in the network and hierarchy of centres is confirmed at policy TP21. The town centre specifically is named as one of Birmingham's growth areas which should accommodate, 'significant growth and diversification of the town centre to improve the current limited retail and leisure offer.'

Policy GA4 of the BDP explains the approach to Sutton Coldfield in more detail, defining the town centre from the heritage area in the north, through the main retail core and along Birmingham Road, including everything within the current ring road, including defined development sites at Brassington Avenue and the station car park.

Policy GA4 relies on the 2009 Sutton Coldfield Town Centre Regeneration Framework Supplementary Planning Document (SPD) for its data. The background studies identified that the centre is under-performing in relation to its population and local spending power and its position within the wider Birmingham economy. Policy GA4 'encourages':

- Delivery of mixed-use residential and retail and office developments including accommodation for the growth of up to 30,000 sq.m. gross of comparison retail floorspace and up to 20,000 sq.m. gross of office floorspace (this includes existing commitments).
- Proposals to redevelop land within the town centre to create an improved retail and residential offer together with associated public realm improvements such as a new town square. In particular redevelopment of the primary shopping area will be encouraged.
- Convenience retail at a scale to meet the needs of the wider area (cross reference to policy TP22).
- A bus interchange to retain good bus penetration, improved pedestrian linkages to the rail station and selective junction and highway improvements.
- A relief road, to enable environmental improvements to the High Street Conservation Area.
- Enhancements to the pedestrian environment and the existing retail offer along Birmingham Road.

Policy GA4 does not look to the nearby surrounding green areas, or to break down barriers to the town centre caused particularly by the railway and ring road.

Langley Sustainable Urban Extension (SUE) was released from the green belt a couple of miles east of Sutton Coldfield Town Centre (policy GA5). Direct, safe, attractive and comfortable cycling and pedestrian routes are required between the Langley SUE and Sutton Coldfield Town Centre alongside improved rapid public transport (SPRINT routes are defined at policy TP41) to minimise reliance on public transport. Peddimore, a large scale release for employment land east of Langley will also need to be served by upgraded public transport alongside its implementation to ensure that it is well connected to Sutton Coldfield Town Centre (policy GA6). Highway improvements will likely be required to serve increased demand.

The importance of the green space network is a key factor within the BDP, and Sutton Park is identified as one of the city's principal 'breathing spaces'. Policy TP7 seeks to maintain and expand this green infrastructure network and protect it from development, and Sutton Park and New Hall Valley have the additional protection of being within the green belt (policy TP10).

Whilst Sutton Coldfield is well connected into its surroundings and to the city centre, there are ambitious public transport proposals for the town in the form of new railway stations on the Sutton Park rail route (currently this serves freight only) and improved SPRINT rapid transport buses. Birmingham's suburban rail network is of limited size and needs enhancement, particularly to support rising levels of commuters.

In addition, the BDP defines a number of 'highway improvement lines' (HILs) which protects aspirational highway routes from other development, routes that would assist with traffic management and help to relieve congestion. Route 11 under policy TP44 is the Sutton Coldfield Relief Road, which is intended to support the adopted Sutton Coldfield Regeneration Framework SPD.

The BDP Policies Map shows the designations of the Plan in graphical form. As well as the designations discussed above, the plan shows:

- The railway station at Sutton Coldfield as a park-and-ride site (in common with other stations on the Lichfield to New Street rail line)
- A strategic cycle route between Sutton Park and New Hall Valley Country Park via Manor Hill – Birmingham Road – Coles Lane
- The proposed general location of the Sutton Park railway station at the Royal Mail delivery office off Upper Clifton Road

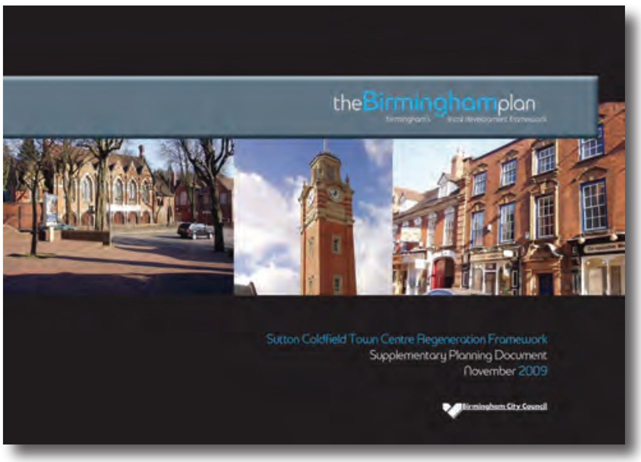
Sutton Park Line

The Sutton Park line is a currently a freight-only railway link which runs east-west across the town centre from Walsall to Castle Bromwich and Water Orton. In February 2008 it was announced that Birmingham City Council, Network Rail and Centro were launching a feasibility study to assess the possibility of re-opening the line to passenger services. In January 2015 this plan was put on hold, however proposals continue to be supported by the West Midlands Combined Authority.

The Birmingham Eastern Fringe Rail Study (June 2014) concluded that it was feasible to re-open the Sutton Park link to passenger traffic to mitigate traffic generated by the Langley SUE and the industrial allocation at Peddimore.

Such a move would require re-opening stations, improvements to some rail junctions (partly to accommodate capacity of both passenger and freight trains) and confirmation of the terminus in the city centre (both New Street and Moor Street are possible but HS2 rail capacity needs to be better understood to confirm this). Parking constraints at Sutton Coldfield would also have to be resolved. The report comments that re-opening the line would benefit the regeneration of Sutton Coldfield Town Centre.

Increases on the Cross-City lines are also possible, but parking at all stations, including Sutton Coldfield is an ongoing problem.



Sutton Coldfield Town Centre Regeneration Framework SPD (November 2009)

Sutton Coldfield Town Centre Regeneration Framework SPD (adopted November 2009)

The SPD set out a long-term (10 to 15 year) vision for the Sutton Coldfield's town centre, and sought to address perceived deficiencies in existing retail, commercial, leisure and residential provision. It recognised that the competing demands of these various sectors would need to respect the character of the area, whilst making the centre a 'destination of choice' rather than just a local shopping centre. It identified opportunity sites to try to make that happen, and focussed particularly on the deficiencies in the Heritage Quarter to the north of the main retail core which was / is an opportunity to promote sustainable commercial development but was / is blighted by the traffic travelling right through it on the main road into and out of the city core.

In 2009, it was recognised that Sutton Coldfield was not fulfilling its potential as a strategic centre within Birmingham City and that it had lost its way and USP. The SPD aimed to provide a vision, offer guidance to the determination of planning applications and ensure that sites coming forward came through in a coherent manner. It aimed to make Sutton Coldfield an 'attractive, thriving and sustainable place', distinguished from other places and supporting Birmingham in its national and international role. It sought to capitalise on its status as a 'Royal' town, diversify its town centre offer away from being just a retail centre, the historic elements of the town centre ad Old Town and better link with Sutton Park. It also wanted to shift the balance between transport modes away from the dominance of the car and towards pedestrians and cyclists.

The priorities of the SPD are to:

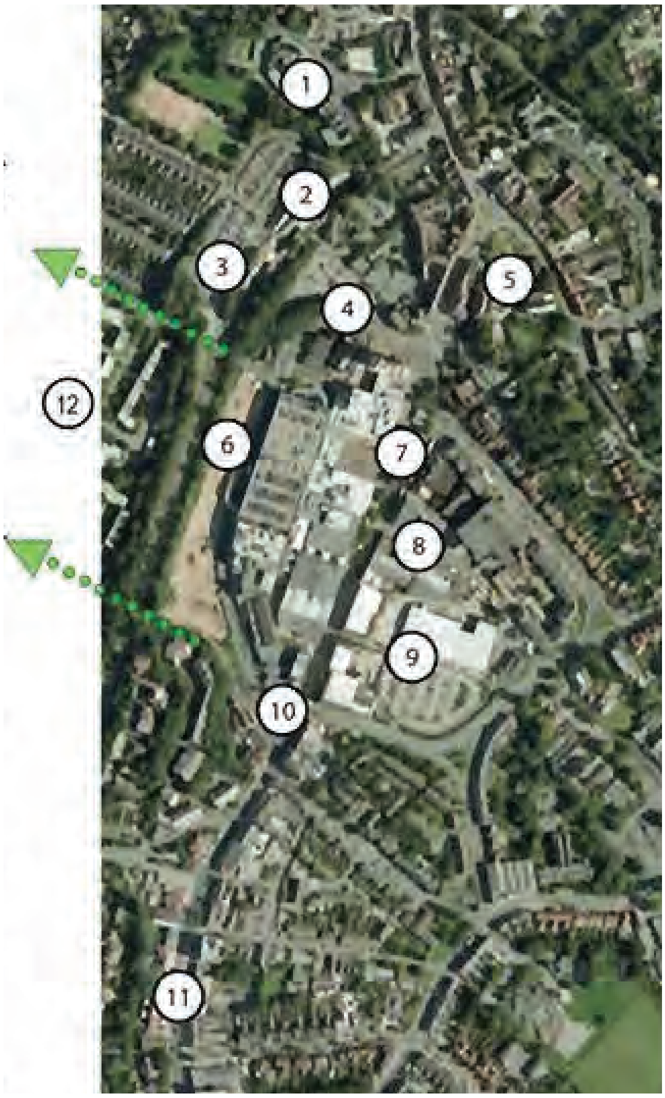
- Enhance the retail offer with an expansion of the existing mall (the Gracechurch) and significant redevelopment to the east of The Parade, including a new anchor store in an improved pedestrian environment;
- A new civic focus, including public services set in a public piazza (including the removal of buses from the prime shopping area);
- Improved connectivity and public realm between the High Street and Birmingham Road by the creation of an 'environmental corridor' through the heart of the town;

- Allow buses to serve the town centre through an new interchange at the railway station;
- Promoting a new use for the Town Hall, using it as a catalyst for improvement in the Old Town;
- Promoting the value and proximity of Sutton Park by improving links to it;
- Encouraging enterprise and new uses within the town centre.

The SPD identified twelve key sites that were important to the ambition of the SPD:

1. Town Hall and Council House (review use of building; promote new commercial and leisure uses to strengthen this part of the Old Town)
2. Train station (improved services and mobility access)
3. Train station car park (increasing car parking bearing in mind conservation area)
4. Sutton Coldfield United Reformed Church (improve setting as a gateway to the town centre)
5. Vesey Gardens (improve the public realm & public space)
6. Brassington Avenue (redevelopment for mixed use and integration into the town centre more widely)
7. The Parade (unattractive; needs to create a 'sense of place')
8. Red Rose Centre (better integration of the site; new civic offer including a new library)
9. Newhall Walk (regenerate with improved retail offer and residential apartments)
10. Southern gateway to The Parade (rationalising traffic and improving the public realm)
11. Birmingham Road (significant environmental improvement, better pedestrian circulation and attractive retail environment)
12. Sutton Park (promotion of proximity; improvements to Park Road)

The SPD defines five themes, which were tested through public consultation and strongly supported.



Extract from Regeneration Framework showing twelve sites important to the ambition of the SPD

Strengthening and improving the retail and leisure offer of the town centre

Evidence prepared for the SPD identified that Sutton Coldfield was under-performing in relation to its population and spending power, with higher spend shopping trips attracted to Solihull and Birmingham. It was estimated that only 4.43% of its catchment population was attracted to Sutton Coldfield, with 22.53% going to Birmingham and a large proportion going to Walsall. The SPD discussed an improvement in the range and quality of retailers in Sutton Coldfield to address what was a long term steady decline in its ability to retain shoppers within its own catchment.

The SPD advocated the redevelopment of The Parade, replacing the public environment with a new piazza and retail / civic / leisure offer including Town Council offices and residential development.

Connecting Sutton Coldfield

The vision within the SPD is predicated on the delivery of a relief road running parallel to the high Street. The SPD recognises the accessibility of the town centre, but also the physical barriers to movement and the impacts they have on delivering growth ambitions. The purpose of the relief road is to protect the historic areas of the Old Town and create a better environment for pedestrians and businesses (traffic would flow one way south through High Street. A new bus interchange would replace the bus stops I the Lower Parade and allow the town centre to become pedestrianised. The plans aimed to improve traffic flow, accessibility and connectivity and improve the environment for pedestrians and cyclists.

The SPD envisioned a 'green corridor' linking key spaces and destinations between the high street and Birmingham Road.

Maximising the historic core

The SPD highlights the importance of the historic buildings and fabric within Sutton Coldfield Town Centre and looks to maximise its potential. It seeks to promote commercial sustainable development in historic and listed buildings and manage traffic movement. The historic area is not able to compete with the retail areas further south and cannot take major redevelopment, so the SPD looks to 'niche local businesses' and a hope that businesses could be incentivised to improve the historic stock. Longer term, the SPD looks to a more comprehensive commercial and residential offer in the area, one which can complement existing leisure and cultural activity.

Traffic though the town is anticipated to be managed by the relief road and by improving public spaces for pedestrians at gateway locations.

Promoting street character and secure design

The SPD looks to improve connectivity, design and security within the town centre, principally using the idea of the 'green corridor' through the heart of the town linking north to south. This is complemented by the Old Town's pedestrian routes and highways, improvements to Vesey Gardens, the bus interchange, the new civic square, the Birmingham Road boulevard and the visual links to Sutton Park.

Recognising the role of the ring road in containing and restricting the town centre, the SPD promotes a series of spaces at key locations in the town centre, and the enhancement of historic streets, to encourage a greener and more connected central area.

Clock tower on the corner of Midland Drive in the Heritage Quarter

Corner of Vesey Gardens in the Heritage Quarter

The SPD defines three character areas:

The Old Town, to include:

- Improved public space and traffic circulation, partly facilitated by a relief road;
- Improved shop frontages and business opportunities;
- A café / restaurant offer, particularly around Vesey Gardens
- Public investment at the station to include more parking on the west side to free up parking on the eastern side, and to offer support to the transport interchange;
- A prestigious hotel and conference facilities at the Old Town Hall and Council House.

The town centre, to include:

- An increased retail quantum (27,000sqm by 2021), and civic offer, particularly on the eastern side of The Parade with residential development above
- Civic space connecting The Parade and Lower Parade;
- New Civic Centre on the site of the current Red Rose, to incorporate local government functions and the library;
- Transport interchange on Station Street, north of the United Reformed Church.

The Boulevard, to include:

- Improved pedestrian experience and public realm along Birmingham Road and better connectivity with the town centre; a gateway at the cinema at the southern end;
- The removal of the roundabout at Queen Street to create a friendlier space for pedestrians and cyclists;
- Alternative south bound routes to reduce traffic on Birmingham Road;
- Active street frontages and encouragement to linger in the street
- High quality public realm and street trees.

Deliverability

The strategy in the SPD is built around the provision of ‘significant’ additional retail space within the centre of town, supported by policies in the UDP and RSS (it is noted that the SPD is shaped by policies that preceded it from the early ‘00s, which also influences the later BDP).

The increased retail offer targets a wealthier shopper – essentially a greater quality and quantity of retail development. To feed this increased retail offer, buses have to come out of the centre and a wider mix of uses go in, largely through the presence of civic uses including the Council’s offices. The Framework also assumes continued growth, positive financial viability, the availability of public funding and the acquisition of land parcels to enable sites to be assembled.

The establishment of a centre capable of out-competing neighbouring centres is at the forefront of the design and delivery proposals.

The first of eight phases was to be the removal of public transport from the Lower Parade and the creation of the new interchange. This would realign the ring road north and provide the relief to the High Street. This would be followed by changes to the retail environment from north to south.

Urban Centres Framework (January 2020)

The Urban Centres Framework provides the strategy to support urban centres to transform into diverse, well-connected and unique hubs at the heart of local communities. The document covers 10 centres, including Sutton Coldfield.

The overall strategy is based around three core themes: increased activity, improved connectivity and enhanced local identity. These core themes are then applied to each centre, with a focus on Big Moves that will act as catalysts for change. The document is not a statutory plan, but the purpose of the framework is to guide investment and unite stakeholders behind a shared vision.

In Sutton Coldfield, the ‘Big Moves’ are defined as:

- A vibrant mix of retail and leisure uses
- Thriving businesses
- A town square
- Connecting Sutton Park
- Sutton Coldfield gateway
- Improved road connections

Langley SUE SPD (2019)

Langley Sustainable Urban Extension (SUE) is located roughly two miles east of Sutton Coldfield Town Centre, on the western side of the A38. The principal road link between Langley Sue and the town centre is Reddicap Heath Road and Reddicap Hill.

The SUE is allocated in the Birmingham Development Plan (Policy GA5) and will make a significant contribution to meeting the needs of the growing population of the City. The Supplementary Planning Document (SPD) captures the essential ingredients for creating a successful place and community. The decision to release 274ha of land from the Green Belt for approximately 6,000 homes was driven by the need to create new communities with all supporting infrastructure.

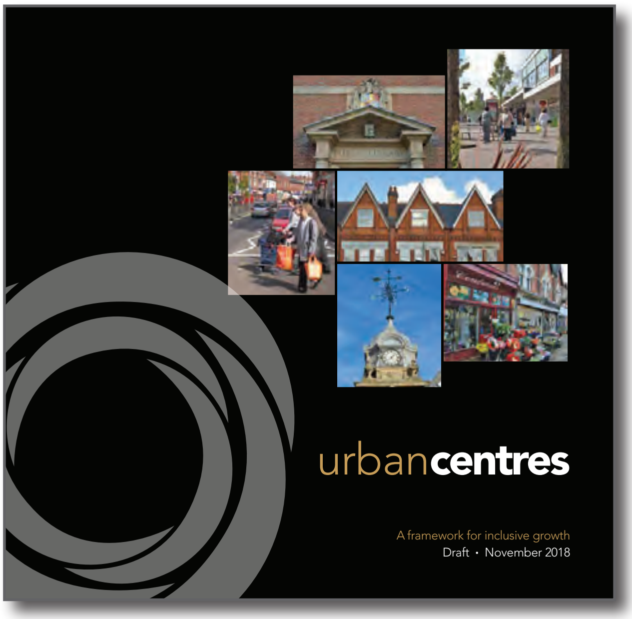
The SPD ensures that Langley SUE is a sustainable development that creates an exemplar place and a thriving community. It adds detail and guidance to the BDP to ensure the cohesive, coordinated and comprehensive development of the allocated site. The draft SPD was subject to a public consultation in Autumn 2018.

As an extension to the urban area, Langley SUE will fall within the catchment of Sutton Coldfield Town Centre, and the increasing population offers the opportunity to enhance to town centre accordingly. Through high quality design, delivery of additional facilities and services, and provision of enhanced infrastructure (including off-site highway and walking and cycling improvements), the development will integrate into Sutton Coldfield. The vision includes enhanced walking, cycling and SPRINT routes from the site into the town centre at Sutton Coldfield, and must consider integration with the existing rail network, and the proposed links on the Sutton Park Line.

The relationship between Langley SUE and the town centre at Sutton Coldfield is not all intended to be from the SUE to the town centre; facilities are proposed on the SUE (such as the sports hub) that are expected to attract people from Sutton Coldfield into the development. In this way, the linkages have to work in both directions at all times.

Peddimore SPD (2019)

The Peddimore site is a 71ha industrial allocation adjacent to, and east of, the Langley SUE site. It is also adjacent to the A38. It will be developed alongside the Langley SUE, and is intended to provide jobs and services locally.



Urban Centres Framework (2020)

Extract from Langley Sustainable Urban Extension SPD (Plan 1)

Birmingham Connected (November 2014) and the Birmingham Transport Plan (draft January 2020)

Birmingham City Council have been advocating a new direction for transport in the city for almost a decade, not only from the perspective of personal movement, but also in terms of infrastructure, funding and its impact on people's opportunities and social mobility. This has been the context for completing work on New Street station, developing the Metro network and for introducing Sprint buses. Current thinking commenced with the Birmingham Connected Green and White papers in 2013 and 2014. Birmingham Connected is the umbrella for all transport planning across the city, which includes Sutton Coldfield.

The latest draft Birmingham Transport Plan 2031 (BTP) is an ambitious document that sets out the future direction of transport investment and design for the city region, including Sutton Coldfield, in the years to come. It recognises that the Birmingham region will continue to be home to more people, and therefore aims to create transport policy that supports a cleaner, greener, healthier, and more environmentally sustainable environment for people to live, work and be educated.

Councillor Waseem Zaffar MBE makes the following statement in The Transport Plan 2020, which should govern our decision making process from now on:

"Over-dependence on private cars is bad for the health of ourselves and our families, bad for our communities and bad for business as measured by the millions of pounds of lost productivity caused by congestion. Ultimately, it is bad for the future because of the very significant damage caused by vehicle emissions and their impact on climate change. The more journeys we take by walking and cycling, the more we will improve air quality and our health and the more we will reduce congestion. For longer journeys, buses, trams and trains will be the backbone of a new, go-anywhere transport system."

The BTP details how the city region will reduce car dependency and deliver the public transport improvements that will create a better environment and inclusive growth for the residents of Birmingham and satellite towns such as Sutton Coldfield. The overarching transport vision is set out as follows:

- *The vision for transport is for a sustainable, green, inclusive, go-anywhere network.*
- *Safe and healthy environments will make active travel – walking and cycling – the first choice for people making short journeys.*
- *A fully integrated, high quality public transport system will be the go-to choice for longer trips.*
- *A smart, innovative, carbon neutral and low emission network will support sustainable and inclusive economic growth, tackle climate change and promote the health and well-being of citizens.*

The vision is disseminated into four 'Big Moves' which need to be followed if the plan is to deliver and respond appropriately to the Climate Emergency. From the four, three of the Transport Plan's 'Big Moves' directly affect Sutton Coldfield, and the town centre needs to respond to them going forward. These are as follows:

- **Reallocating road space,** changing away from single occupancy private cars to support the delivery of a public transport system fit for a global city, fundamentally changing the way that people and goods move around the city.
- **Prioritising active travel in local neighbourhoods** – walking and cycling will become how most people get around their locality most of the time. Cars will no longer dominate street life around homes and schools. A limit of 20mph will be standard on all local roads. Residential neighbourhoods and local centres will be places where people are put first.
- **Managing demand through parking measures.** Parking will be used as a means to manage demand for travel by car through availability, pricing and restrictions. Where development potential exists, land currently occupied by car parking will be put to more productive use.

Birmingham Walking and Cycling Strategy (draft June 2019)

The key aim of the draft Birmingham and Cycling Strategy is: *"To increase walking and cycling in Birmingham, for transport, leisure and health, particularly for short journeys and in combination with public transport."* It highlights that increasing walking and cycling amongst its residents would have significant health and wellbeing effects, as well as helping the City to reduce its traffic congestion, overall carbon emissions and improve its air quality. The Strategy helps to achieve BDP Policies TP39 and TP40 and identifies 13 of its own policies. It has been developed in a series of six stages, based on the Department for Transport Local Cycling and Walking Infrastructure Plan (LCWIP) technical guidance.

Sutton Coldfield is proposed to be integrated within the City-wide strategic cycle networks, is a Core Walking Zone and Green Travel District, taking into account its connectivity by public transport. A strategic cycle route already exists between Sutton Park and New Hall Valley Country Park, as mentioned previously under the Birmingham Development Plan summary.

Birmingham Parking Standards SPD (November 2019)

Consultation on the revised parking standards in the city completed in February 2020, with the intention that new standards will replace the 2012 standards once adopted. Revised parking standards are required to reflect new national guidance and support the delivery of the Birmingham Development Plan as well as wider air quality and climate emergency objectives. The SPD also sets out a coherent and equitable parking strategy for the city which will support the replacement of the Birmingham Parking Policy (2010).

Managing parking provision is a vital tool for addressing travel behaviours, reducing car ownership and usage, and helping Birmingham to meet its climate emergency and clear air priorities. Sutton Coldfield is defined within the document as an Urban Centre / Growth Area, where larger developments are encouraged to make off-street parking publicly available and to protect levels of disabled parking. The provision of parking in Sutton Coldfield will need to balance supporting the local economy and providing access, with safety, health and wellbeing, and addressing the climate emergency.

The climate emergency and ‘Route to Zero’ (R20)

In June 2019, the City Council unanimously voted to declare a climate emergency with a commitment to achieve carbon neutrality by 2030. This is the City Council’s ‘Route to Zero’. This commitment must be factored into how we plan and design for the future of Sutton Coldfield to ensure ‘business as usual’ dramatically changes to reflect the urgency of the situation.

The Route to Zero taskforce was created in autumn 2019 and brings together Members and officers from the City Council and representatives from the West Midlands Combined Authority, the NHS, higher education, business, faith communities, the third sector, young climate strikers, climate campaigners, and other key partners and stakeholders. The taskforce is currently working to develop recommendations for how everyone in Birmingham can contribute to tackling climate change and benefit from a safer, fairer, and more sustainable city.

Birmingham City congestion

View from Birmingham Road looking towards The Parade

3 Understanding Sutton Coldfield

3.1 Wider context

Sutton Coldfield is a large, historic town in the West Midlands, traditionally part of north Warwickshire, but administratively part of Birmingham City Council. It lies about 7 miles north of Birmingham city centre, very much on the edge of 'Greater Birmingham's' built-up area, and as such it is close to larger open areas of open space and green belt. To the north is the cathedral city of Lichfield, and to the east the town of Tamworth.

Sutton Park is arguably the town's defining feature. It is a Scheduled Ancient Monument, a Site of Special Scientific Interest (SSSI) and its 970ha open space consists of a mix of heathland, woodland and wetlands with much of it protected as a National Nature Reserve, and other areas identified to have historic monuments or special natural features. It is widely used for a range of recreational and commercial activities as well as civic and community events.

The town is effectively made up of eight wards, encompassing Sutton Park in the west across to the A38, and Over Green and Minworth in more open agricultural land to the east. It is the largest town within the Council's administrative area and second only to the city centre in terms of its status. The main town centre lies in the middle of this area, close to the western extremity of Sutton Park, but there are several strong local centres, including Mere Green, Four Oaks and Boldmere which provide local services and facilities.

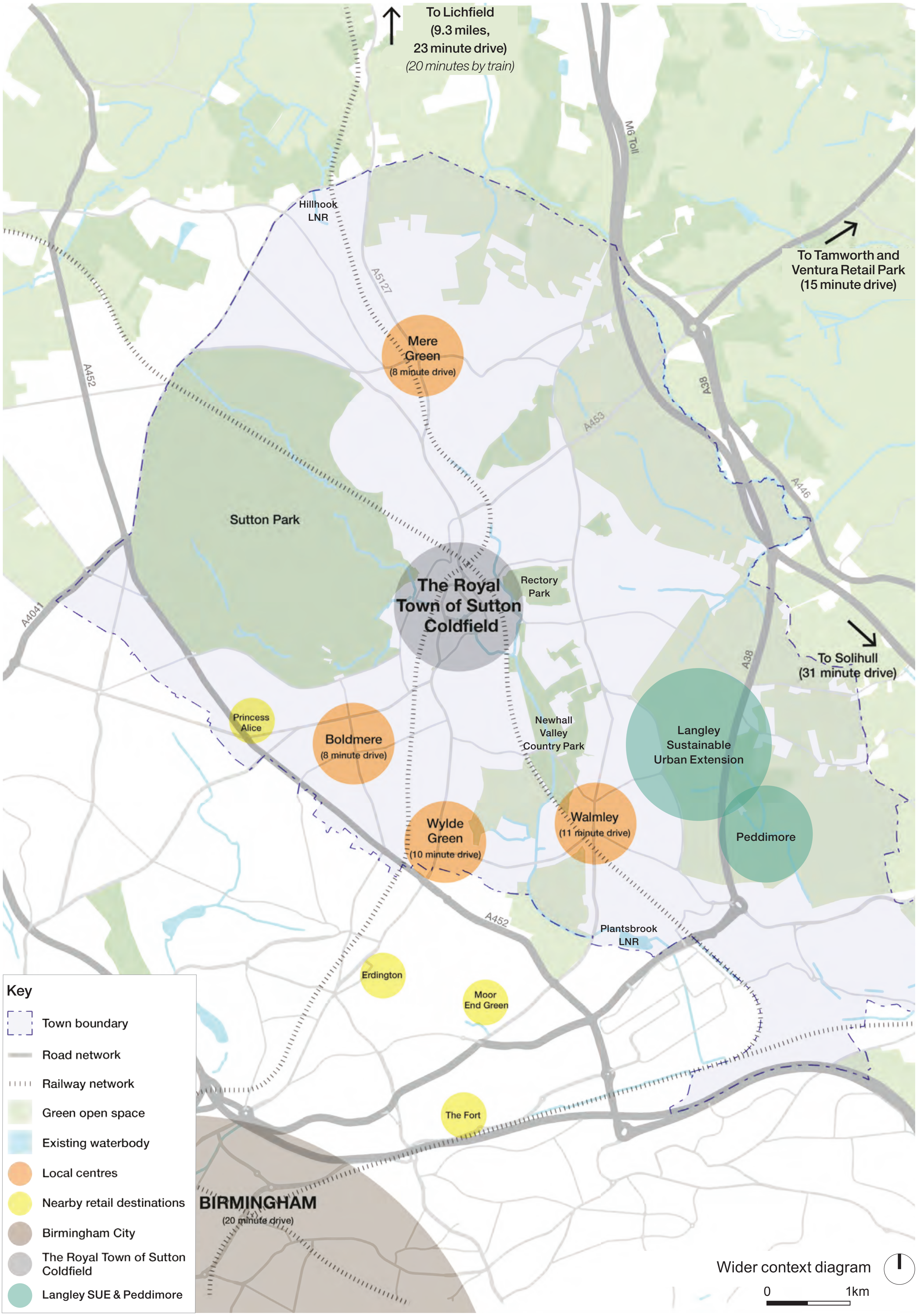
The town is perceived as having a good quality of life and an attractive natural environment, reflected in its leafy residential streets, higher house prices and relatively more affluent social groups. Unlike many of the larger towns in the conurbation, Sutton Coldfield does not have large areas of industrial land and is overwhelmingly residential in nature.

Sutton Coldfield is well connected, particularly by road, with main routes direct into Birmingham and to surrounding settlements. The M6 Toll Motorway runs north-south just five miles to the east. The main railway station is on the (Cross City) Lichfield to Birmingham line and is a busy commuter service. A second railway line, running roughly east-west, is currently used by freight only. Close by, and as a result of its good accessibility, are the major attractions of Drayton Manor theme park and The Belfry Hotel and Resort.

Within the boundary of the town, a large area of undeveloped land has been released from the green belt to provide new housing and industrial development, known as Langley Sustainable Urban Extension (SUE) and Peddimore, respectively. Both new developments will need to be well-connected to the town centre to support its offer and ongoing viability.

Mill Street looking south, down The Parade

Frequent train services from Sutton Coldfield station



Wider context diagram

3.2 Town centre boundary

At the northern end, the town centre boundary crosses the freight-only railway line, and includes within it the large institutions of Sutton Coldfield College and the West Midlands police station, both of which are well set back from Lichfield Road. Some of this area is within the Anchorage Road Conservation Area.

South of the freight railway lies the main historic core of the town around High Street, Coleshill Street and Mill Street. This is centred on the triangular public space in front of the Holy Trinity Church, Vesey Gardens. The boundary excludes the railway station and a vacant site on Coleshill Road once occupied by a factory, but these are both significant factors for the Sutton Coldfield Town Centre masterplan, particularly the station and its car park. A large part of this area is within the High Street Conservation Area.

The boundary widens out south of the historic town to take in the ring road and everything within it. To the western side, the site along Brassington Avenue between the railway and the back of the Gracechurch Centre has been vacant for many years and is a key opportunity for the town centre if its potential can be unlocked. The area within the ring road contains the retail core, formed essentially by three shopping centres – the Gracechurch Centre to the western side of The Parade, the Red Rose Centre and Newhall Walk both to the eastern side. Each of these centres has its own car park, and together they form most of the parking provision within the town centre boundary.

The southern extent of the town centre boundary extends along Birmingham Road, from the Queen Street roundabout to the Driffold intersection, past the Empire Cinema. The boundary follows the plots of buildings fronting the road which are deep in places. This stretch of road is a secondary retail and commercial area with multiple food and drink establishments along it. The built form is varied and inconsistent, and the road is wide and busy. Residential development quickly dominates beyond the road and outside of the defined boundary, much of it attractive.

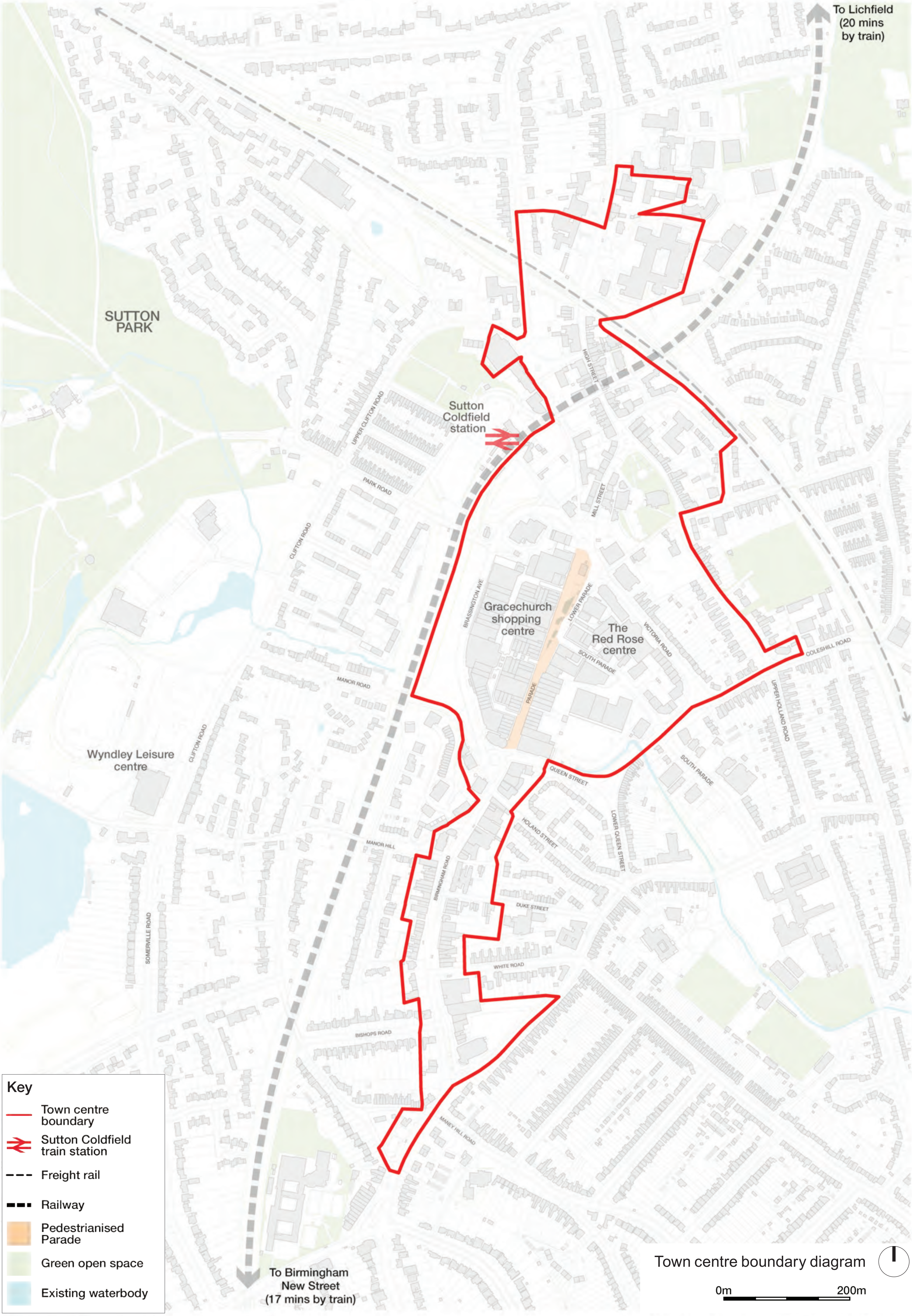
The railway line, to the west of the town centre boundary, is a dominant factor. It has several crossings both under and over the railway line which really brings into focus the changing topography. It acts as a barrier particularly in relation to Sutton Park and distinctly marks a change in character with the residential areas to the west, being quiet, leafy and prestigious. This is quite a marked change from the bustle and activity on Birmingham Road.

The town centre has a very linear feel because of the spine of the route coming through the area; High Street – Mill Street – The Parade – Birmingham Road. While the distance is not far, it feels further than it is due to the dominance of traffic, the barriers to movement, the distinct uses each area currently has and the lack of any incentive to go from one to the other.

Whilst the town centre boundary is the focus for the masterplan, there are factors which will influence the masterplan that exist outside of this line, for example Sutton Park and the proposed Langley SUE and Peddimore developments to the south-east.

View from High Street towards Vesey Gardens and the Holy Trinity Parish Church

View south from the northern end of The Parade



Town centre boundary diagram

3.3 Character areas

Sutton Coldfield's town centre area falls naturally into five main character areas. These are easily defined due to the nature of town's growth, the presence of infrastructure which has inadvertently caused barriers that separate different parts of the town, and because of the clusters of uses that exist.

The public realm, however, is consistently poor across the town centre in that streets are generally dominated by vehicles due to wide carriageway widths, narrow footpaths and a lack of crossings, causing traffic to move quickly and with minimal reasons to stop or slow down. The exception is the pedestrianised and centrally-located Parade, however oversized junctions at either end physcially and psychologically disconnect the town centre's retail core from the adjacent character areas. These poor conditions are exacerbated by a general lack of trees, planting and nature across the town centre, except to the north of The Parade and towards the southern end of Birmingham Road. Further commentary on the public realm is provided under the following character area headings.

Sutton College

North of the railway, Sutton College dominates the area as a large educational establishment with a distinctly institutional character set back from Lichfield Road. The Police Station, former Court, and Fire Station is opposite on the western side of the road, again a large institutional building set back from the road. The road widens as it leaves the historic town that is to the south, and traffic once again dominates. The environment is designed to enable traffic movement. Some remnants of Sutton Coldfield's history remain, notably with the former School of Art and the adjacent red brick former Catholic church, but the tighter grain and more human scale of these buildings has limited impact on the nature and character of the area.

Royal Town Core

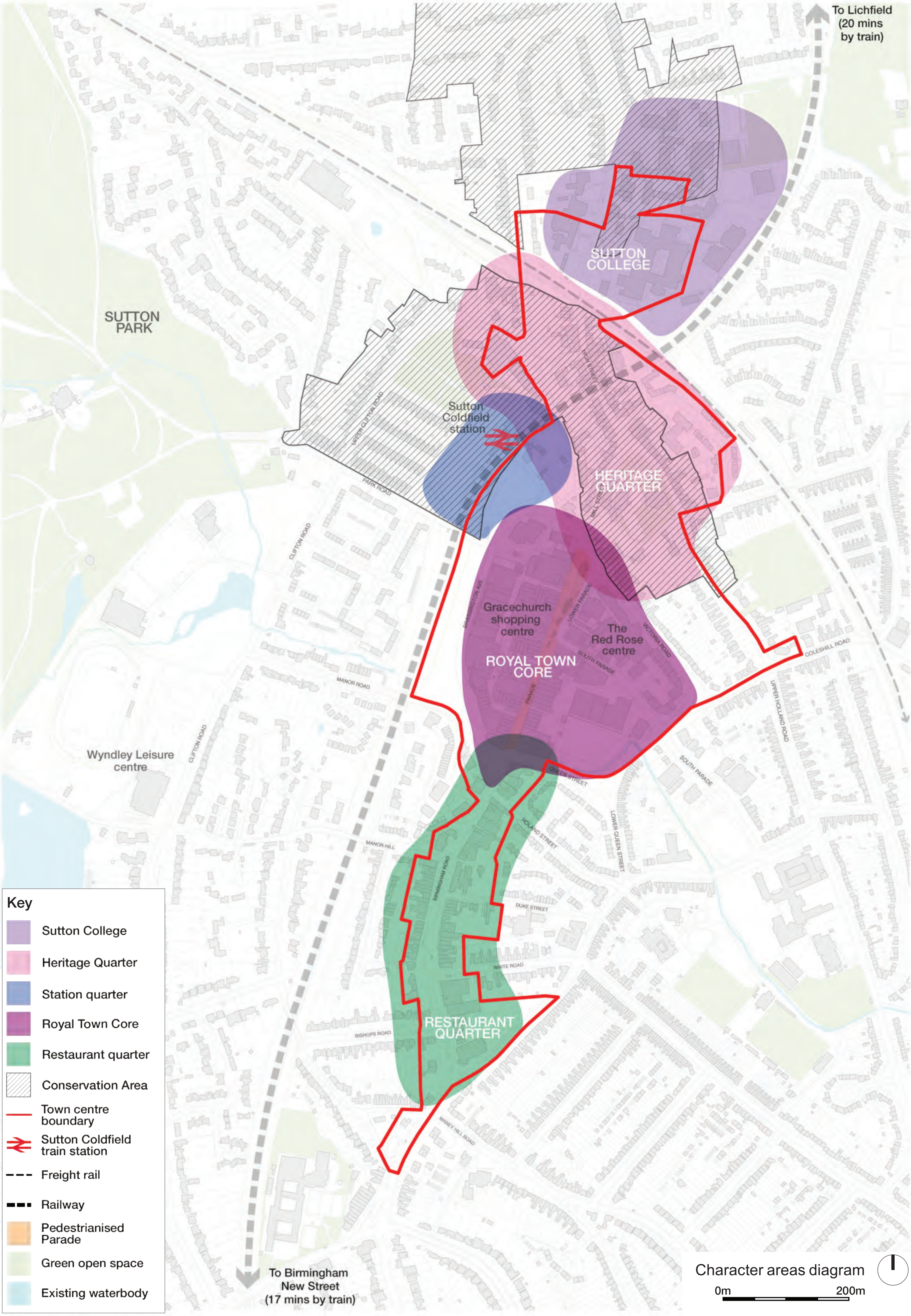
Effectively enclosed by the ring road, the Royal Town Core area is perhaps what most people may think of as the town centre. It is, however, dominated by shopping, with little else going on. There are two streets; The Parade / Lower Parade which traverses the area from north to south, connecting the two sides of the ring road, and South Parade. As discussed in the previous Town Centre boundary section, it is dominated by three shopping centres.

The Gracechurch Centre occupies the entire block between Brassington Avenue and The Parade. Shops face The Parade and there is a parallel arcade which is partly indoors. The arcade loops back to The Parade and there is no public access to Brassington Avenue. The centre does not face the station, but a small entrance to the north links past the United Reformed Church and offers a popular shortcut. The associated car park allows access directly into this privately managed shopping centre.

The Red Rose Centre has a narrow frontage onto Lower Parade, but includes a gloomy arcade to an internal square from which the library is accessed. This is a highly unsatisfactory arrangement for the library, which suffers from a lack of visibility and inaccessibility on top of the unattractive environment in which it sits. Despite this, the library appears to thrive and be well regarded. A large multi-storey car park is located at the back of the Red Rose Centre with a large dominating frontage along Victoria Road. As a public carpark faciity, it has been poorly managed and offers an inadequate customer environment.

Newhall Walk is a 90s-style retail warehouse park bounded by the ring road and faces away from the town centre. It is however connected by a walkway to the southern end of The Parade, which traverses the changing natural topography in this area. It has its own surface car park which dominates the space and the site's Queen Street frontage, and serves Aldi and four warehouse-type retail units (occupied by two operators currently). The retail park detracts from the town centre and works against the shops on The Parade.

Contrasting architecture of the retail core, on The Parade



Character areas diagram

Mill Street at night

The Gracechurch was built in 1974, replacing the buildings that existed on The Parade. The Red Rose Centre was built at the same time, but has perhaps fared less well over time. The development of these two centres ensured that there are no significant buildings of any age in this area. The two centres face one another and have a widening space between them that could form an attractive civic space; however, the space is separated by a change in level and a curious piece of landscape design which does more to divide the area than it does to unite it.

The ring road acts as a collar around the Royal Town Core. The junctions within the ring road at the north and south ends of The Parade are confusing and alienating to those not in vehicles, and the nature of the ring road and its one-way gyratory makes for aggressive driving and a hostile highway system. Crossing these junctions is not appealing, and neither is walking along the ring road.

The pedestrianised Parade itself is a unique asset for the town centre and has a lot of potential as a community meeting and gathering place. Currently, however, it appears dull and uninviting. Despite a number of benches located along its length, these fail to provide an attractive and comfortable place to sit and spend time as they tend to be bookended by bins which have suffered from wear-and-tear. There is also a notable lack of play elements, within what could be a suitably safe environment due to the lack of traffic, and only a minimal number of businesses spilling out onto the pavement. The occasional weekend markets bring vibrancy and additional activity to The Parade which creates a positive atmosphere.

The Parade hosts occasional events, markets and other community activities

Heritage Quarter

Sutton Coldfield developed around High Street, Mill Street, Coleshill Street and the triangular space created in front of the Holy Trinity Church at Vesey Gardens. Along these streets, much of the historic feel of the place remains. Some buildings date back hundreds of years.

High Street is narrow and tight, and the plots are dense and deep with archways and entrances from the High Street into the back of plots common. The height and mass of buildings is consistent and a dark reddish brown brick dominates. The old buildings are rich with detail, and the street pleasantly curves towards the church, which is framed by the road approaching town. This area of the town centre has active uses within the ground floor, including shops, services, and food and drink. This includes a number of small professional services such as accountants, architects and lawyers, many of which are long established family firms. The area also contains a hotel and public houses.

High Street widens out into Vesey Gardens, merges into Mill Street – which then heads down towards The Parade – and Coleshill Street which skirts around the eastern side of the church. The formal Vesey Gardens is prominent in the church's foreground, and the space is well defined and beautifully kept, but sadly the contrived highway layout – engineered for the benefit of vehicles – compromises its impact and the effect of the framing that the historic buildings provides.

Buildings in the Heritage Quarter tend to be grander, rising to three storeys, with heights emphasised by the elevated land. The modest church has a square tower, and is located on a high point in the town, making it a surprisingly prominent landmark. Equally, 8 High Street on the corner of Midland Drive, provides a striking focal point with its elaborate corner tower, clock and weather vane.

Coleshill Street has a more intimate, residential feel facing the wall of the church grounds. The street is narrow and quiet and limited in vehicular movement, with noticeably no modern infill along the almost continuous terrace of red-brick buildings. The church grounds offer overhanging trees and bushes. Mill Street is the main road, and starts to drop down from Vesey Gardens quickly. It has some modern buildings, but the workhouse and former town hall still stand on the eastern side, the latter being a fine example of Gothic Victorian architecture with an intricate patterned exterior. Mill Street suffers from the dominance of traffic, and lacks activity through the absence of active ground floor uses and the paucity of space allowed for pedestrians. Towards the southern end of Mill Street, the road widens dramatically as it hits the ring road, and the environment becomes open, hard and confusing.

All of this core area within the historic town is part of the High Street Conservation Area, and it creates an attractive piece of townscape. The Conservation Area also extends to the west, taking in the station, King Edward Square and Upper Clifton Road. Between the High Street and the station, much of the land is incoherent and confusing, often because it constitutes informal surface parking and the dominance of parked cars detracts from what buildings and space do exist. Much of this area has remained like this because it forms the route of the protected relief road. In the absence of this proposal, the development of these sites could contribute significantly to the quality of this area.

King Edward Square warrants particular comment because of the quality and distinctiveness of the older buildings – the town hall and the former hotel – and the spaces in front of them which contains the war memorial. The view from High Street through here is attractive, and the panorama of the hotel towards the tower of the town hall is memorable, but the absence of any comprehensive setting to the area leaves it feeling like a missed opportunity, lacking the attention it deserves. Again, this is down to the protection of sites for the relief road, which proposes a roundabout in the location of the war memorial.

The cobbled connection between the war memorial and the station is particularly of interest (albeit, potentially inaccessible for those unable to manage both the uneven surface and the gradient).

Footpaths within the Heritage Quarter are particularly narrow compared to the rest of the town centre and walking and cycling feels unsafe with little to no other people-focused street furniture to provide a sense of safety and enclosure.

Station Quarter

The Station Quarter consists of the area immediately around the station, including the station building itself and Station Street. Between the High Street and the station, much of the land is incoherent and confusing. It primarily consists of informal surface parking and the dominance of parked cars detracts from the buildings and spaces that do exist. Much of this area has remained like this because it forms the route of the protected relief road. In the absence of this proposal, the development of these sites could contribute significantly to the quality of this area, as mentioned previously.

As the 'front door' of Sutton Coldfield for many visitors, the Station Quarter has significant potential to improve perceptions about the town, and provide a distinct setting for different parts of the town. From the main station building, there is a direct connection to High Street and, up the cobbled path, a similar connection to King Edward Square. The station also has a rather confusing side entrance onto Station Street which forms a poor impression as a point of arrival to the town centre.

Due to the carparks along Station Street, it is designed as an engineered road with road markings and kerbs, despite being a relatively low traffic environment. There is little to indicate the direction of The Parade and the town centre core from Station Street, and the size of the roads and pedestrian crossings gives the impression you are not close by, despite being minutes away.

The station entrance onto Station Street; the main entrance is located on Railway Road.

Station Street is unattractive and is not well-integrated with the town centre, providing a poor and disorienting sense of arrival.

A variety of food and beverage establishments are located along Birmingham Road, deeming it the 'Restaurant Quarter'

Restaurant Quarter, Birmingham Road

Birmingham Road is the southern part of the through route across Sutton Coldfield, and is a busy two-way highway. However, businesses appear to prosper along here, and both sides of the street have a mix of services, shops and eating places. Unfortunately a lack of crossings (only 2 along the approximately 450m stretch) limits the connectivity across the road, and reinforces the dominance of moving traffic.

Buildings along the street is inconsistent, varying in both height, from the six storey office block at Duke Street, to the mixed one- and two-storey small shop units at 10-38, and architectural quality. The art deco Empire cinema is located at the southern end, and there are two significant public houses, The Bottle of Sack and The Brewhouse.

Fortunately, footpaths of reasonable widths are provided on both sides of the street, with the eastern side being more consistently generous. There is limited on-street parking available, and parking on the highway is discouraged through the placement of a reaonsable frequency of small concrete bollards, which are relatively discrete. Further south on the road, there is parking within the street section creating a poor environment for pedestrians. Some of this parking is illegal.

The residential areas either side of the road appear to offer an attractive living environment and the housing seems to be of a good, spacious standard with many streets having trees and large gardens. Vesey Manor, opposite the cinema, houses an antiques and art shop. Beyond the southern boundary is the Beeches Walk parade of shops, serving local needs. Manor Road and Manor Hill offer walking and cycling links to Sutton Park. Also in the area, and particularly on the eastern side of the road, is more sporadic parking provision, including at Duke Street and behind the cinema.

The road has the potential to offer an attractive gateway into the heart of the town centre, but this is currently compromised by the tendency of the road to dominate. The lack of cycle infrastructure (lanes or parking provision) is also notable. Whilst the area is said to thrive on a Friday and Saturday night, there is minimal interaction between the Royal Town Core and this area, partly due to the ring road and partly because there is no real trading of uses between the two areas that could enable it.

3.4 Topography

The differences in level in Sutton Coldfield's central area are prominent and obvious to anyone walking or cycling around the area, or arriving in the town by rail. This variety in levels is reflected in many of the town's road names.

Whilst the central area of town, within the ring road, is relatively level, the land drops down from Parade to Lower Parade - clearly reflected in the name - and resulting in the awkward attempt to deal with the change in levels in the middle of Parade. The land continues to drop away along South Parade before levelling out; the route of the Plants Brook follows this course.

Birmingham Road is similarly level along its length, but the land rises steeply to the west of Birmingham Road up Manor Hill to College Hill before dropping quickly back down, towards Clifton Road and Sutton Park.

The railway line runs through a cutting at this point, but further north, alongside the Gracechurch Centre and Brassington Avenue, it runs on an embankment to the railway station. Manor Hill goes over the railway, but only 250 metres north, Manor Road goes under it.

The station is also on slightly elevated ground, and further north it rises still, putting the railway back in a cutting / tunnel as it continues north, and giving rise to differences in level between the main station entrance onto Railway Road to the north, and the southern entrance, down the stairs, on Station Street.

The Old Town, north of the station, is perhaps the highest point of the town, the road again rising steeply towards the Town Hall and High Street, and the Holy Trinity Church at the top of Church Hill / Trinity Hill, which perhaps marks the most prominent point within the immediate area.

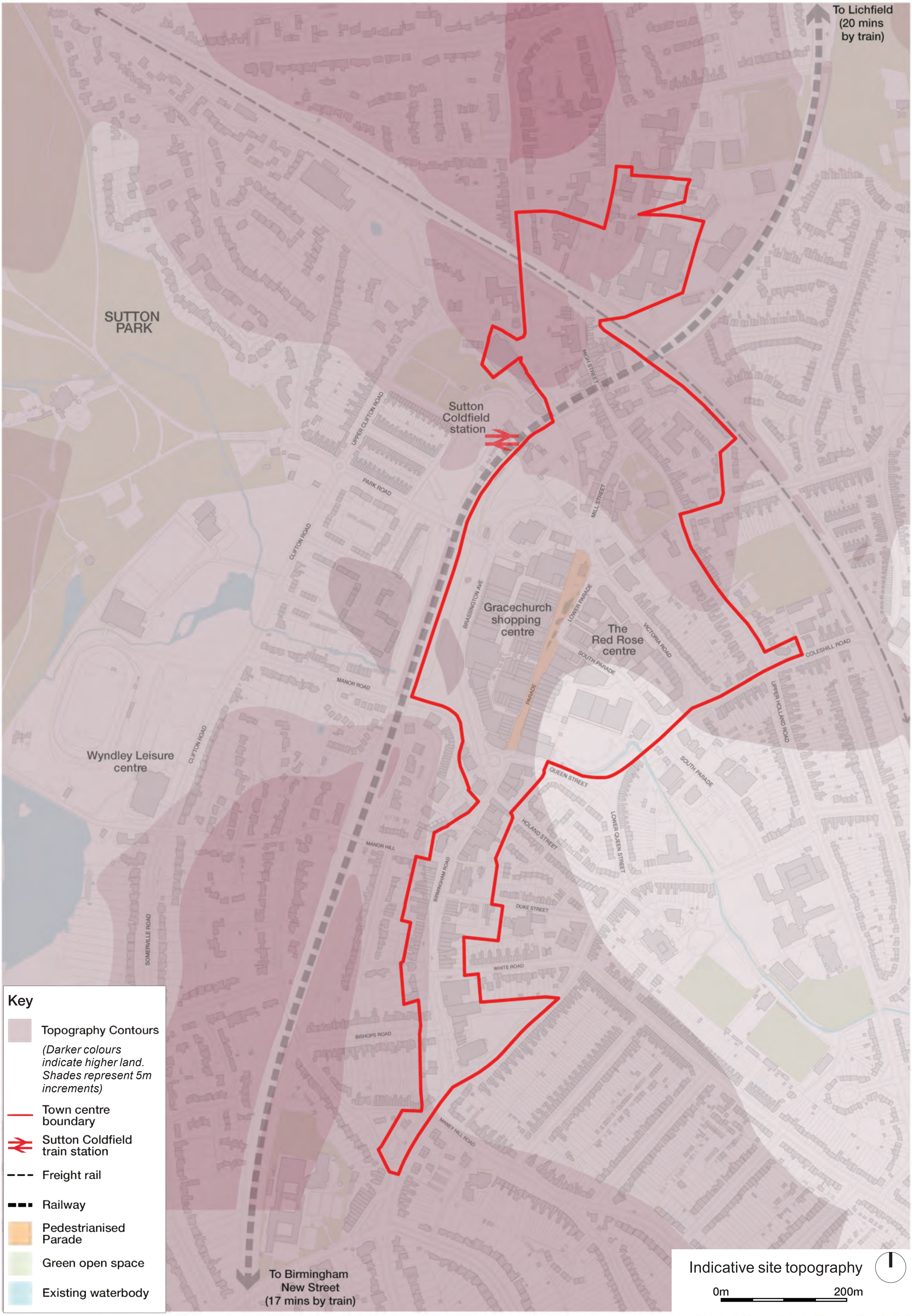
The impact upon movement of these rapid changes in height are significant, and can make cycling and walking more difficult at times and locations, and more so in poor weather when surfaces - such as the cobbles off King Edward Square - can become difficult. Older people, or people who are less mobile for a variety of reasons, may be deterred if access to transport hubs or key services and facilities are more difficult.

Within the central area of Sutton Coldfield, the differences in level are apparent, most notably in the nature of the green surroundings on most sides. Changes in height are clearly apparent in looking at the tall apartment blocks on Caversham Place, for instance, or in the elevated position of the church when seen from points on The Parade.

Changes in topography need to be considered in planning for the future of the town centre; what might be seen as opportunities can easily become constraints to movement.

The railway runs on an embankment in the middle of the town centre, but in a cutting on the peripheries

Sutton Coldfield's topography noticeably rises to the north



To Lichfield (20 mins by train)
SUTTON PARK
Sutton Coldfield station
UPPER CLIFTON ROAD
PARK ROAD
CLIFTON ROAD
HIGH STREET
MILL STREET
BRASSINGTON AVE
Gracechurch shopping centre
LOWER PARADE
The Red Rose centre
VICTORIA ROAD
SOUTH PARADE
COLESHILL ROAD
PARADE
MANOR ROAD
UPPER HOLLAND ROAD
Wyndley Leisure centre
CLIFTON ROAD
QUEEN STREET
SOUTH PARADE
HOLLAND STREET
LOWER QUEEN STREET
MANOR HILL
BIRMINGHAM ROAD
DUKE STREET
WHITE ROAD
SOMERVILLE ROAD
BISHOPS ROAD
MANEY HILL ROAD
To Birmingham New Street (17 mins by train)
Key
Topography Contours
(Darker colours indicate higher land. Shades represent 5m increments)
Town centre boundary
Sutton Coldfield train station
Freight rail
Railway
Pedestrianised Parade
Green open space
Existing waterbody
Indicative site topography
0m
200m

3.5 Movement

Sutton Coldfield benefits from good rail links and inherent walkability, however with streets prioritising vehicles over people walking or cycling, car numbers have increased to the detriment of people visiting, working, and shopping in the town centre.

The ring road isolates the town centre, forming a barrier for people trying to cross it to gain access to the shops and amenities on foot. This has resulted in more people choosing to drive, leading to traffic congestion, poor air quality and high noise levels. Pedestrian accessibility is poor, with limited footway space and low quality, misplaced or missing crossing facilities.

The severing effect of the ring road weakens connections to many of Sutton Coldfield's unique assets - particularly Sutton Park and the historic High Street. Sutton Coldfield train station is similarly disconnected, resulting in a poor sense of arrival and legibility.

Responses to the consumer survey undertaken in preparation of this baseline report (refer Appendix) shows that around 60% of town centre visitors arrive by car. Potentially many short car trips could alternatively be made by walking, cycling or public transport. This is perpetuated by the low cost and high availability of car parking and comparatively high cost of public transport.

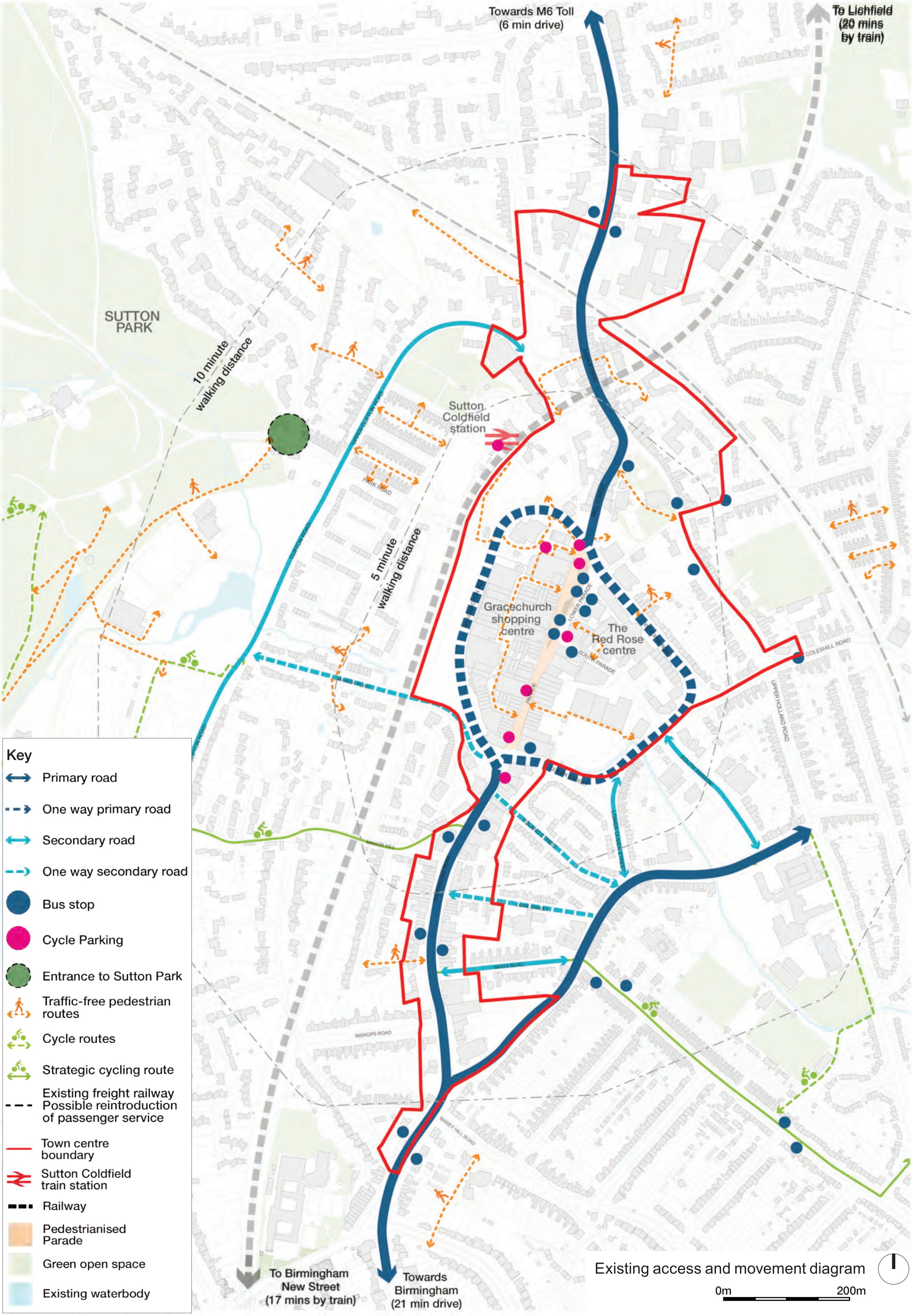
Despite this, bus use is an important mode of transport for visitors to Sutton Coldfield Town Centre – with around 30% of people travelling by bus to the Lower Parade interchange. Plans to relocate buses to a new location near the station will enable simplification of the complex bus network, and create a more pleasant and integrated arrival point into the town centre. This will subsequently allow Lower Parade to be repurposed and reimagined to create an attractive people-focussed environment that can support a range of activities and uses.

Addressing car dominance, prioritising walking, and enabling cycling in Sutton Coldfield is key to creating a place where people want to spend time; and where shops, cafés and businesses want to be. The town centre needs to provide enjoyable, sociable and green public open spaces as part of the movement network to positively connect the town centre to residential communities, and provide the types of streets that can support the appreciation the Town Centre's heritage and unique features.


Looking south-west on Station Street towards the ring road

Existing one way road systems cause congestion within the town centre

Car dominance and lack of pedestrian provision including regular crossings on High Street



Existing access and movement diagram

3.6 Wider networks

Sutton Coldfield lies about 7 miles north-east of Birmingham city centre and borders Little Aston, North Warwickshire, Lichfield, Erdington and South Staffordshire.

The town centre is linked by frequent and fast services from the Rail Station to the centre of Birmingham on the Cross-City Line. The regularity, speed, and relative good value of the train and bus services allows Sutton Coldfield to perform a valuable role as a hub for people that work in Birmingham. Proposals to re-open the freight line would offer an additional route to those travelling in the region.

The town centre is by-passed to the north by the M6 Toll, accessible from Sutton Coldfield by junction T2 at Minworth, T3 and T4, and T5 at Shenstone. It also has easy access to the M6 to the south, via junctions 5, J6, and J7 at Great Barr; and also the M42 in the east, via junction 9 near Minworth. This can provide relatively easy vehicular access to surrounding towns, including Solihull and Lichfield.

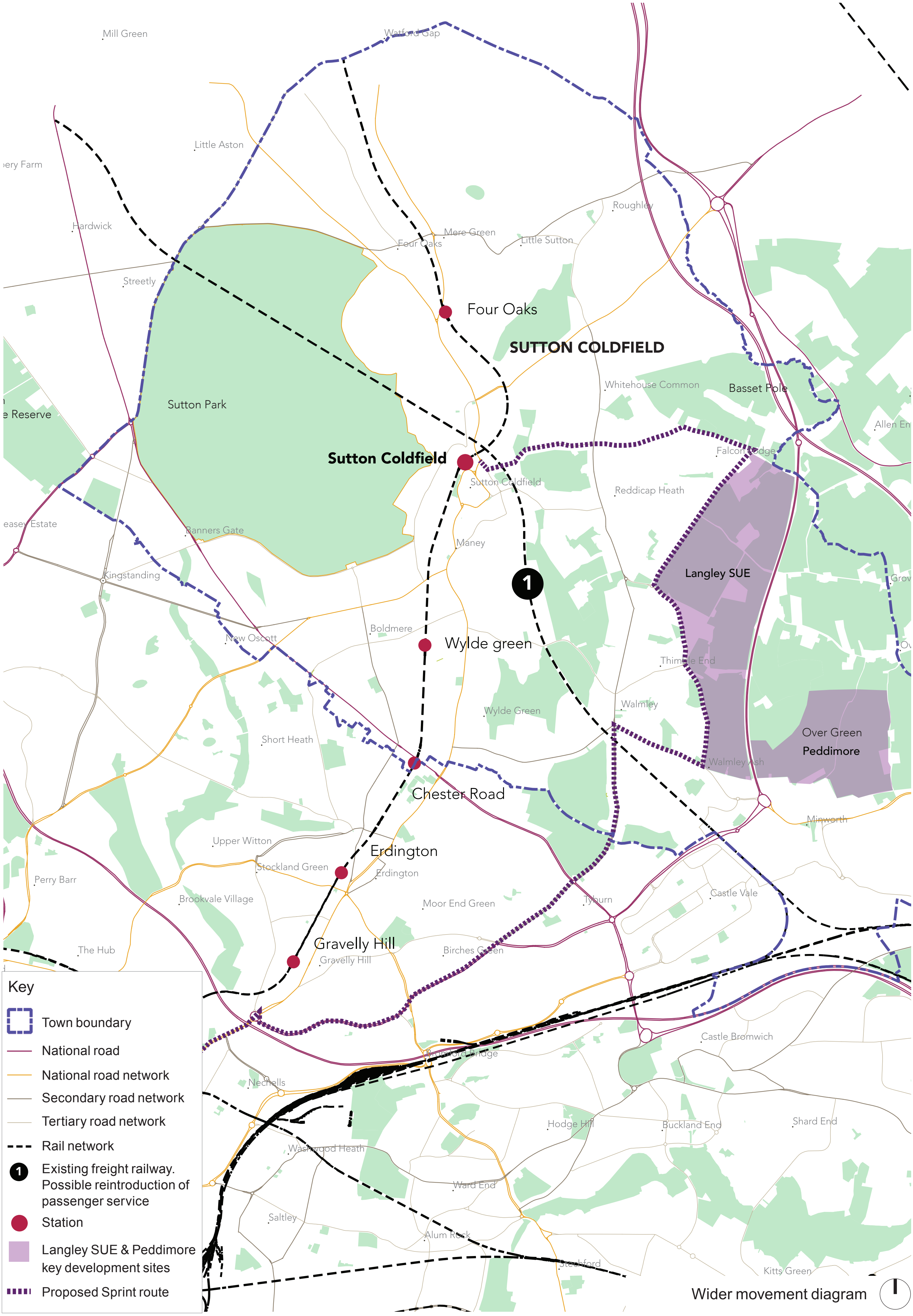
The A38 used to run through the centre of the town using the line of the pedestrianised Parade, but now uses the dual carriageway bypass to the east, which is the faster route between the city centre and the M6 toll and beyond. The former route of the A38 is now the A5127 Lichfield Road, branching from the southern end of the Aston Expressway on the Birmingham Middleway ring road, and continues to provide a major connective route running between, and on slightly altered paths, through the centres of Erdington, Sutton Coldfield and Lichfield.

The Parade in the town centre is the main destination and terminus for numerous National Express West Midlands and other bus services in and through Sutton Coldfield. Routes serve major towns within the conurbation, including Wolverhampton, Walsall and West Bromwich as well as local centres.

The Cross-City line serves Bromsgrove, Redditch, Sutton Coldfield and Lichfield and connects them to Birmingham New Street

Buses from around the region serve the centre of Sutton Coldfield

The former A38, now the A5127, runs through local centres including Wylde Green



Wider movement diagram

3.7 Walking and cycling

Sutton Coldfield Town Centre and the wider area is inherently walkable and cyclable. A 5 minute walk will take you from the train station to all locations within the ring road and to the northern end of Birmingham Road. Moreover, a 10 minute walk will take you from The Parade to the college in the north, and through most of Birmingham Road to the south, as well as to the gates of the impressive Sutton Park to the west. A 10 minute cycle will see you cover off most of the urban extents of the Town Centre Boundary.

This level of proxmity would normally see higher rates of walking and cycling in a town centre environment than those seen in Sutton Coldfield, as demonstrated by our retail survey respondents who primarily visited the town centre by car and bus. Walking is relatively low, given the high density of population near the town centre, though the low use of bicycle may reflect the age profile of visitors (a third of those surveyed were 65+).

However the 'infrastructure invitation' to walk and cycle is poor, and the highway infrastructure is a huge barrier to people walking and cycling - further reinforcing car use.

This is demonstrated clearly through examples across the town centre, but the route from the station and the shopping centre is a good example. Station Street is an unwelcoming street which culminates in a complex road junction between Station Street, Reddicroft and Brassington Avenue which is difficult to negotiate. Similarly, the access from the town centre from Brassington Avenue to Park Road, and Sutton Park beyond, is off-putting to pedestrians because of the lack of a safe crossing across a 3-lane wide carriageway

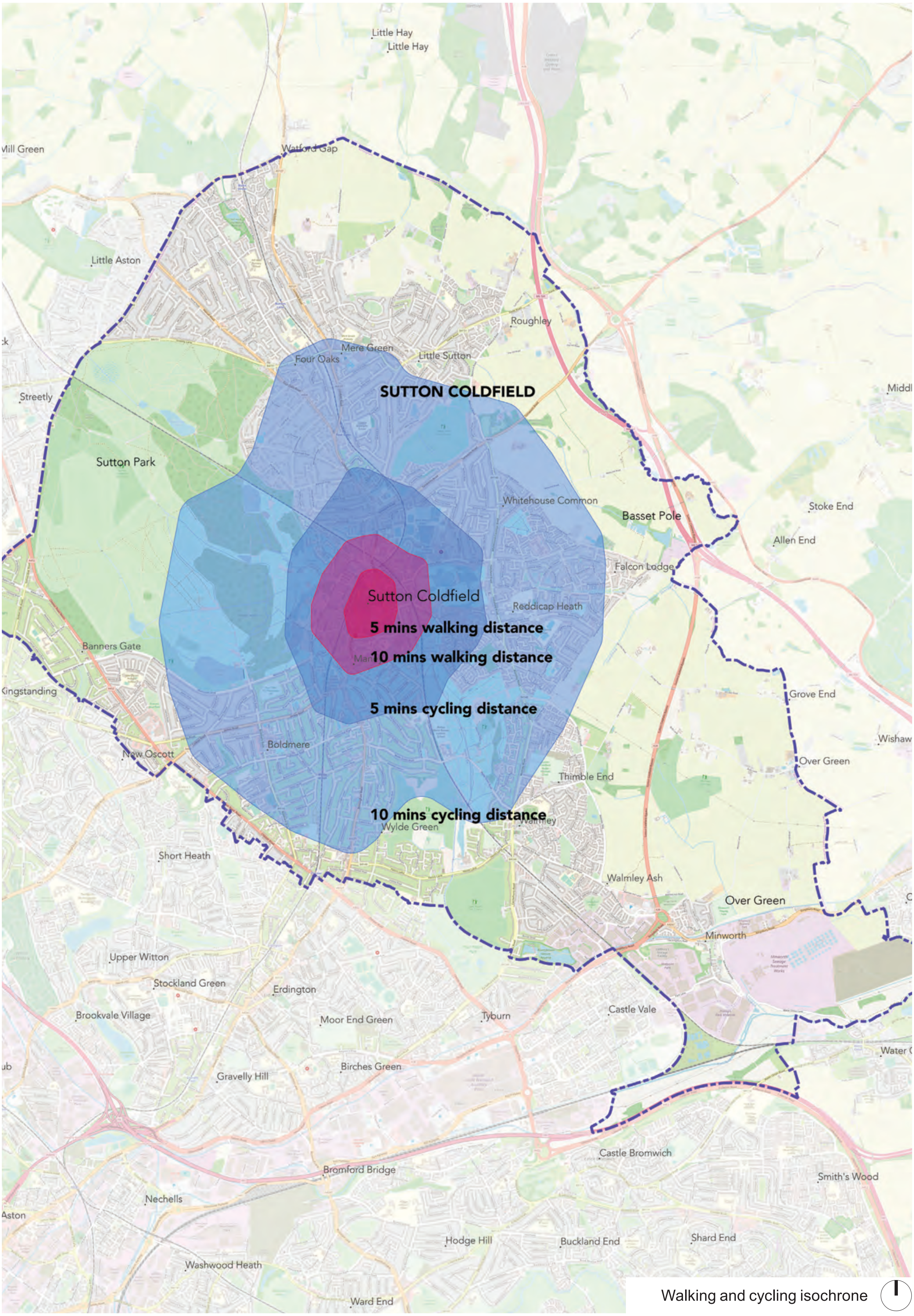
The topography potentially limits some cycling but cycling infrastructure (including parking provision) is inadequate generally and often missing altogether in places. Streets such as Birmingham Road and Mill Street have the width to easily accommodate cycles, but the opportunity has not been taken. Similarly, quieter routes such as Upper Clifton Street and Holland Street don't have cycle provision.

A strategic cycle path connects Sutton Park and Newhall Country Park across Birmingham Road, but anecdotal evidence suggests that the main roads in the centre of town are the most hostile to cyclists using this route.

The design of the public realm is currently dominated by prioritisation of vehicular movement, for example, guard rails encourage vehicles to move quickly around roads

Cycling currently feels unsafe due to the hostile car-dominated environment and limited cycle infrastructure generally

Key connections are missing from the pedestrian network - especially between the Town Centre and Sutton Park.



Walking and cycling isochrone

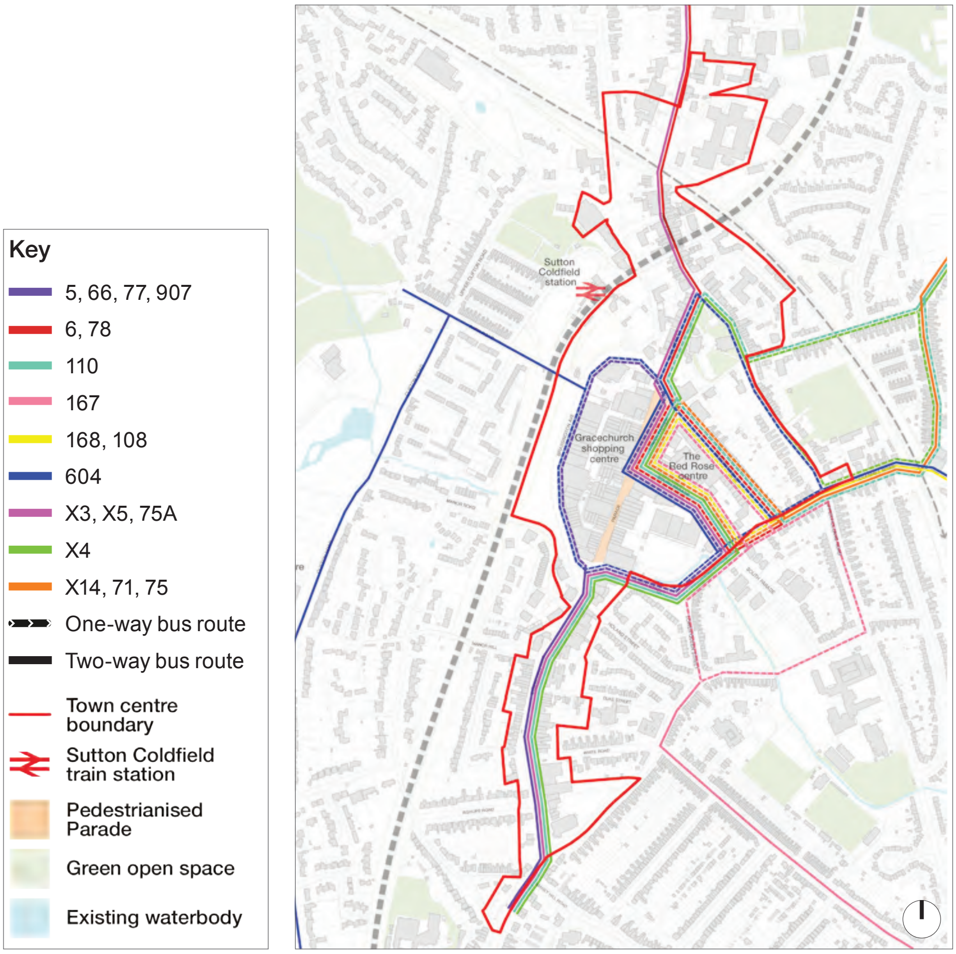
3.8 Bus routes

Bus routing through the town is highlighted in the plan to the right. The plan highlights that bus services are complex in their routing - with bus services having to perform numerous turns in order to service Lower Parade and avoid the pedestrianised Parade.

It could be argued that the increased cornering of bus services around Lower Parade and South Parade further reinforces the barrier effect of the ring road, as well as negatively impacting air quality in the town centre.

Simplifying and prioritising bus movements through the town centre will be explored in the next stages in order to improve service reliability, and user experience - in addition to improving the town centre environment.

The general environment around the bus stops on Lower Parade is generally poor and unattractive.



Bus networks diagram

3.9 Future transport propositions

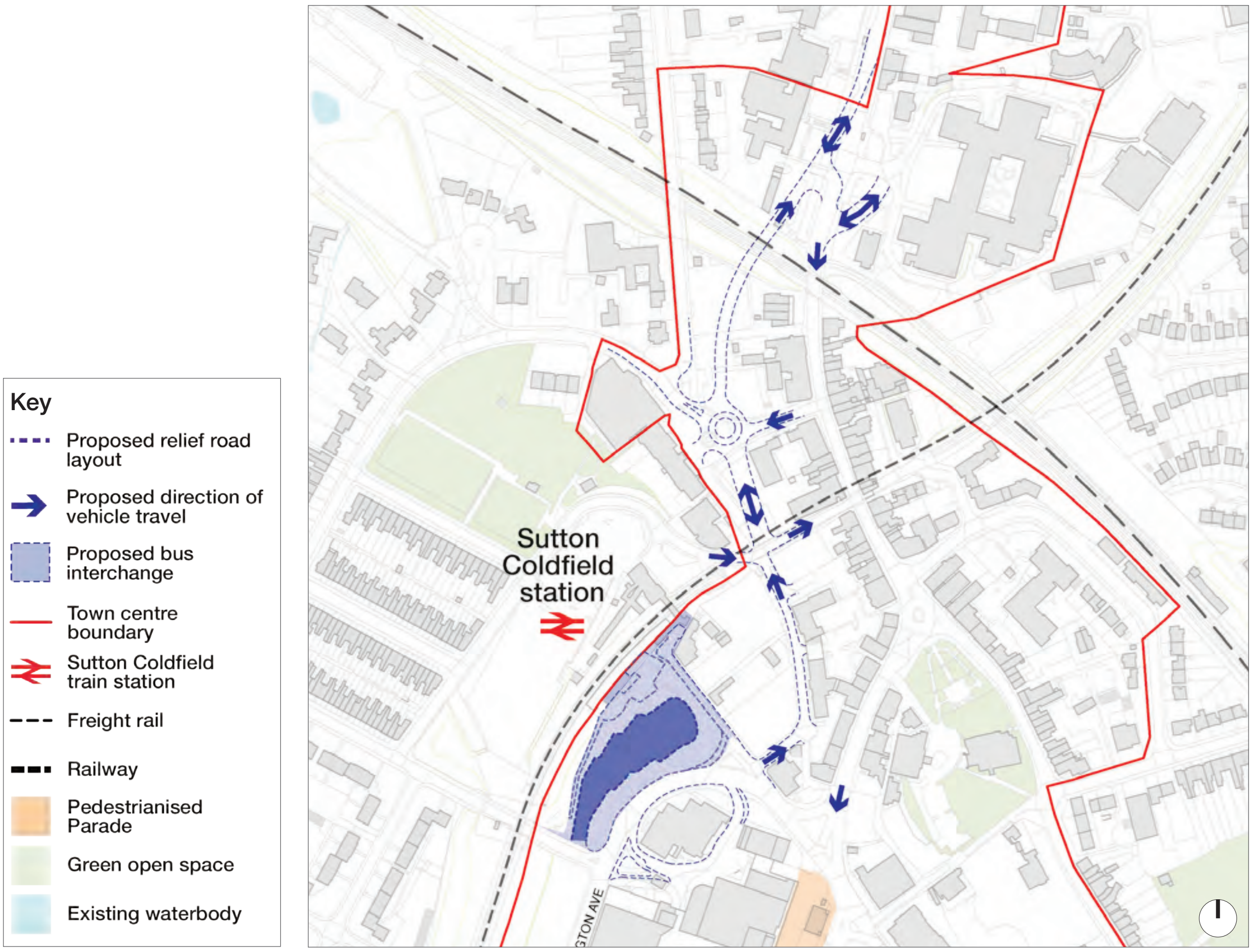
The plan below illustrates plans in the public domain for transport changes in the town centre, at various stages of development and with varying levels of support.

The relief road has long been proposed to primarily reduce traffic dominance on Mill Street / High Street and this study will evaluate the benefits of such a project and how best to achieve these objectives.

In addition the bus station development aims to create a more coherent transport interchange area and this study will explore what benefits can be unlocked by this development and how best to connect the town centre with this new interchange.

Studies into developing and understanding the feasibility of reopening the freight railway line to passenger traffic is outlined in Chapter 2.3 Planning Policy.

The 2009 relief road proposals aim to relieve congestion from High Street and Mill Street



Proposals for transport improvements

3.10 Car parks

The plan to the right illustrates the location, footprint and number of spaces offered by town centre car parks, as well as highlighting their ownership (private / public).

Analysis shows that there are over 1600 spaces offered in public ownership and almost 1300 offered in private ownership. In addition to this, indicative occupancy analysis highlights that there is over-provision of car parking in the town centre.

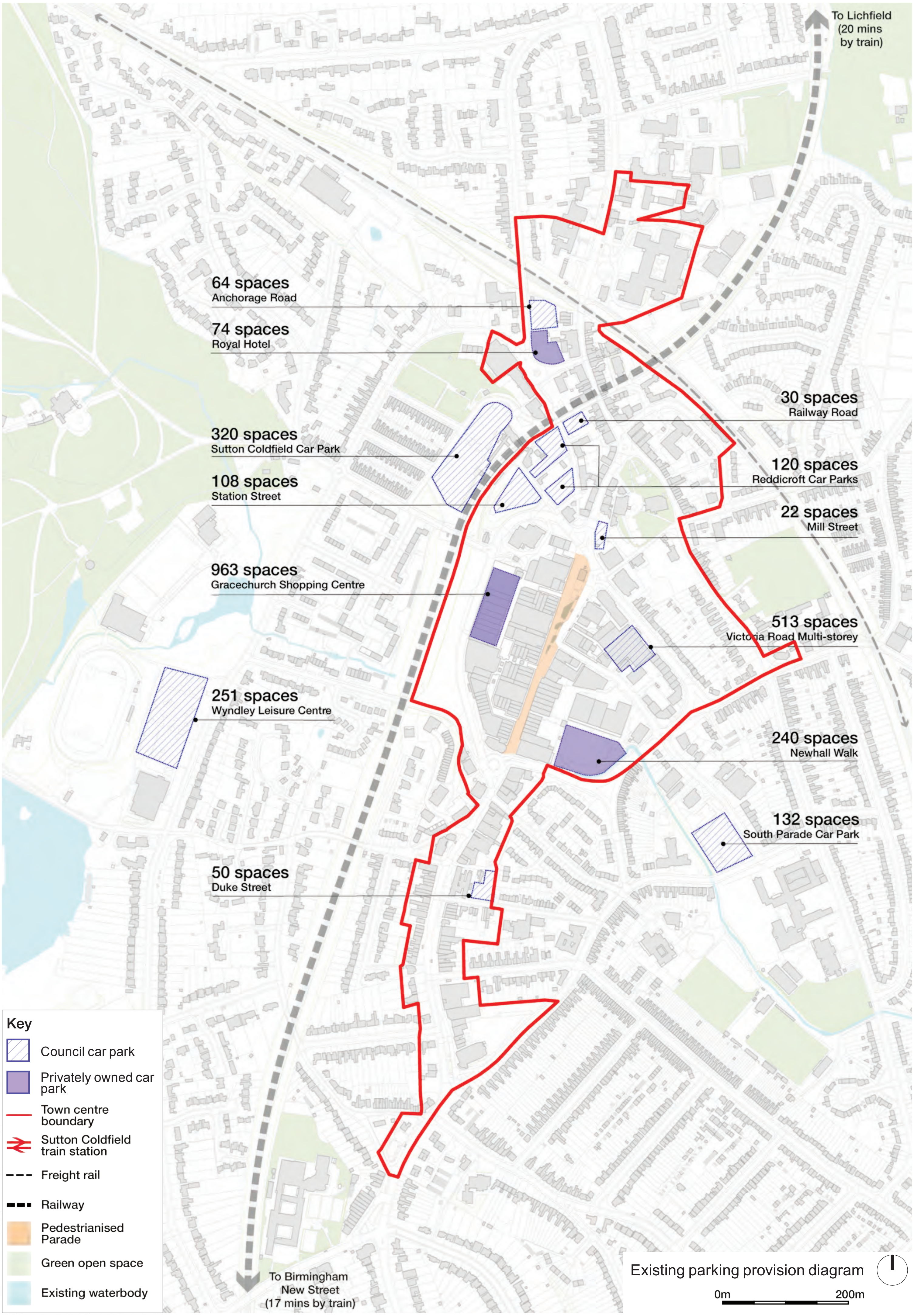
Further provision is made on-street for disabled drivers, notably at the southern end of Brassington Avenue

Considered alongside City Council objectives to increase the number of people walking and cycling and reduce the number of people driving, the next stages of work will consider re-purposing some City Council-owned sites in order to reduce the invitation to drive that these car parks offer.

The dominance of car parking and infrastructure in the Town Centre is stark, reinforcing the sense of vehicle priority.


Footway parking is common in the Town Centre, discouraging people from walking and reduces accessibility.

Several surface car parks exist in left over spaces around the town centre, including this one on Mill Street.



Existing parking provision diagram

3.11 Healthy Streets check

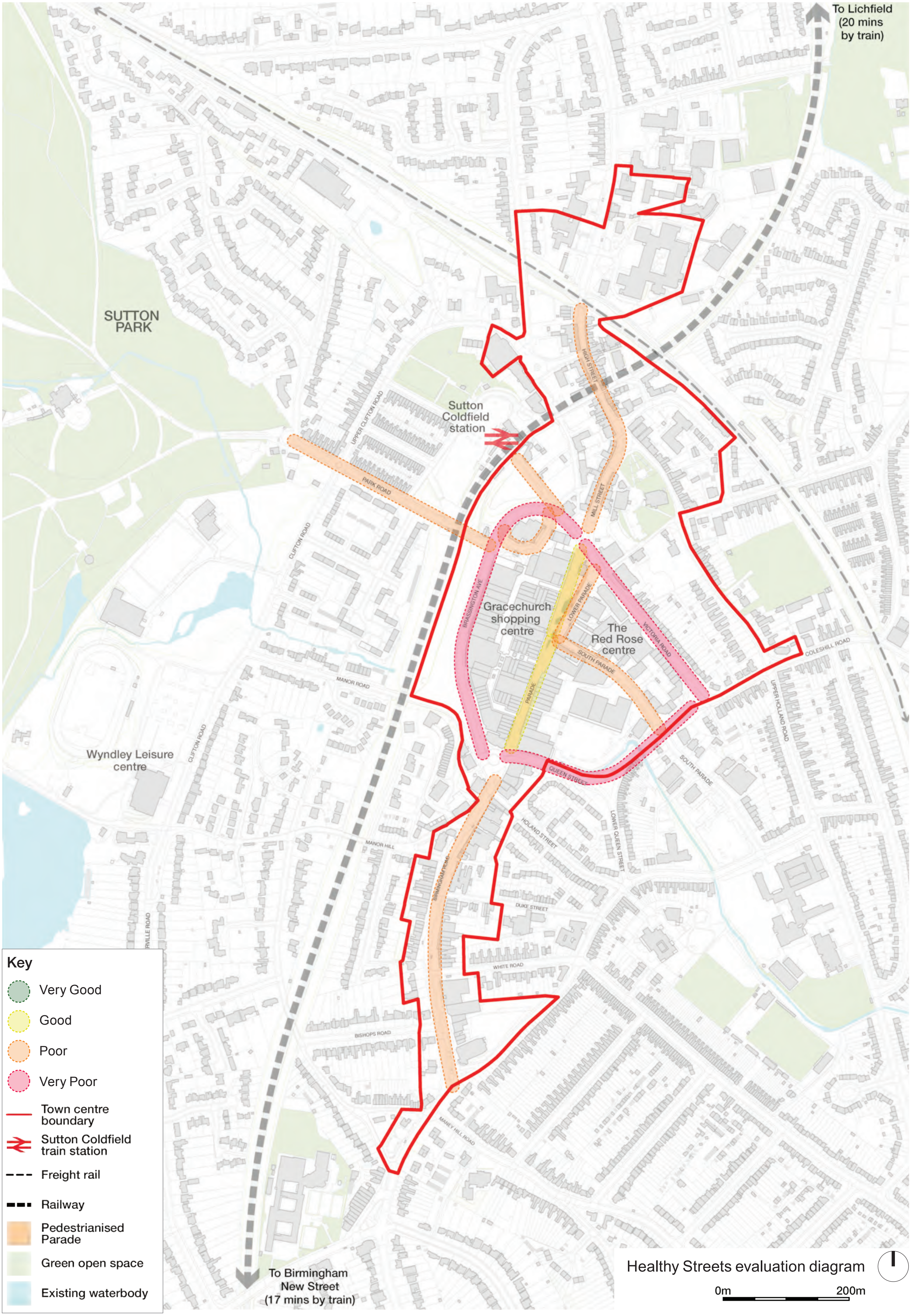
Streets have a huge role to play in our daily lives as well as the health of place and the health of our minds and bodies. The space in between buildings can be used to tackle a huge number of social, economic, political, and environmental issues - however for many years this space has simply been used primarily for the movement of vehicles. Healthy Streets is a concept developed by Transport for London and the Mayor of London as a way of assessing how streets are performing in their broader objectives and not simply in terms of how they move vehicles. In short, the concept helps us see where we need to focus more on the Place function over the Movement function of streets as they are under performing for people.

The plan to the right highlights the scale of problem the town centre faces, with streets in a way disregarding what they can do to improve the health and happiness of people in favour of moving vehicles.

The Gracechurch Centre on The Parade has some positive features but needs to be improved to create a more attractive environment.

Many streets wthin the town centre are currently hostile to people walking, cycling, and trying to access the town centre.

The provision of seating needs to be improved to ensure there are frequently places to rest along desire lines.

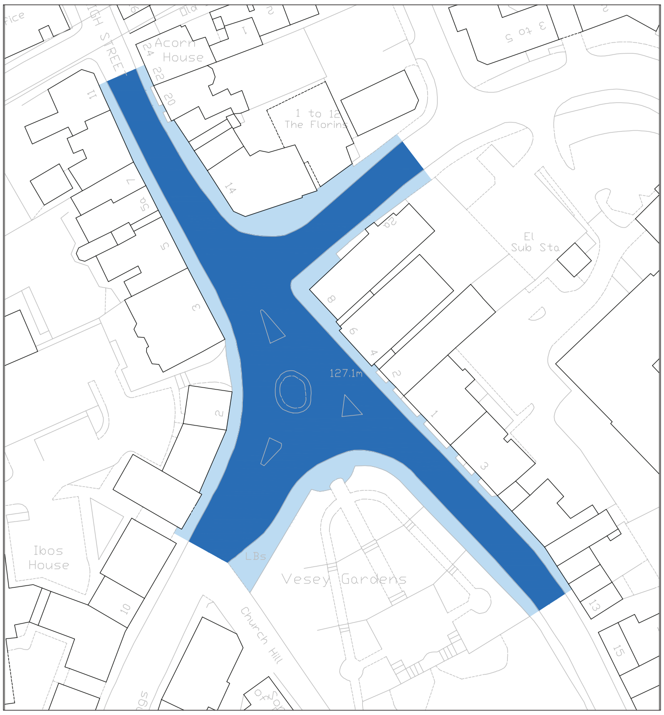


Healthy Streets evaluation diagram

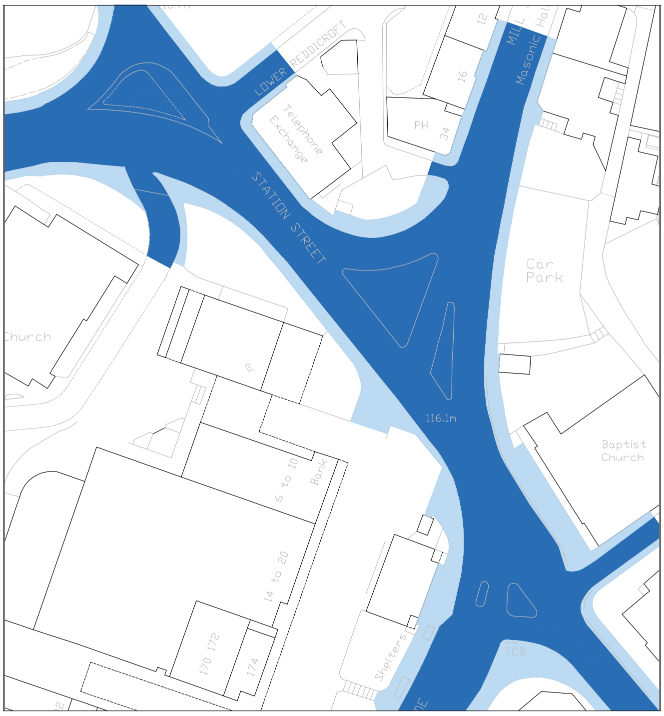
3.12 Existing junctions

Many of the key junctions that form the street network in Sutton Coldfield, especially those on the gyratory, have particularly generous carriageway widths. More specifically, once central / splitter islands and roundabout islands are taken into consideration, the distance that a pedestrian might have to cross to go from one footway to another can be significant. Furthermore, where different streets meet, the geometry used at these junctions often resembles that more usually associated with motorway slip roads than historic, urban streets.

To put this into some sort of perspective, there are a number of junctions in Sutton Coldfield where a Boeing 737-300 can be accommodated wholly within the carriageway. This is a plane that can carry 140 people with a wingspan of 29m and a length of 33m, and yet one can comfortably sit within the kerb lines of the Lower Queen Street junction on the gyratory. Another way to think about this style of street design is that the only constraint appears to be the requirement for minimum footway widths (often as narrow as 2m). Once the associated kerb lines are offset from the adjacent property boundaries, whatever space remains is assigned for the movement and parking of vehicles. In this way it can be thought of as 'outside-in' design approach.

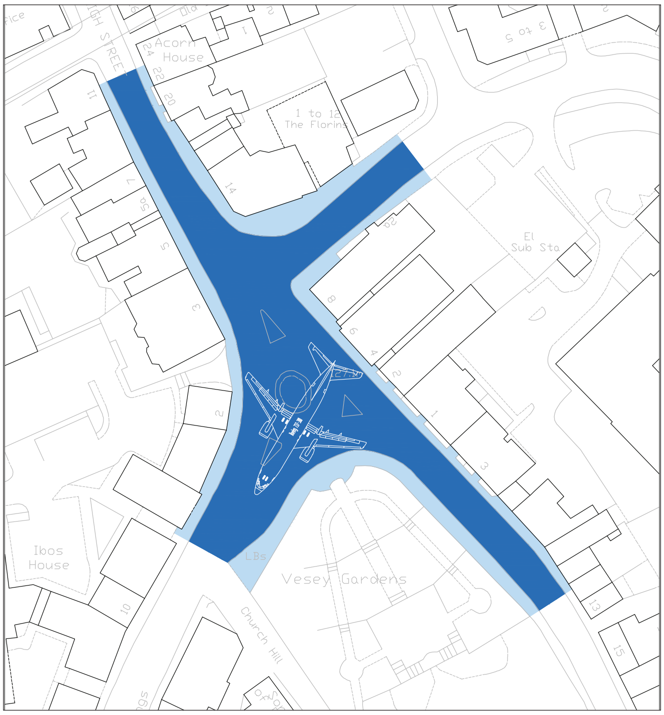


The junction of Mill Street and High Street today, with large amounts of space given of to vehicle movement. (1 of 3, continues on next page)

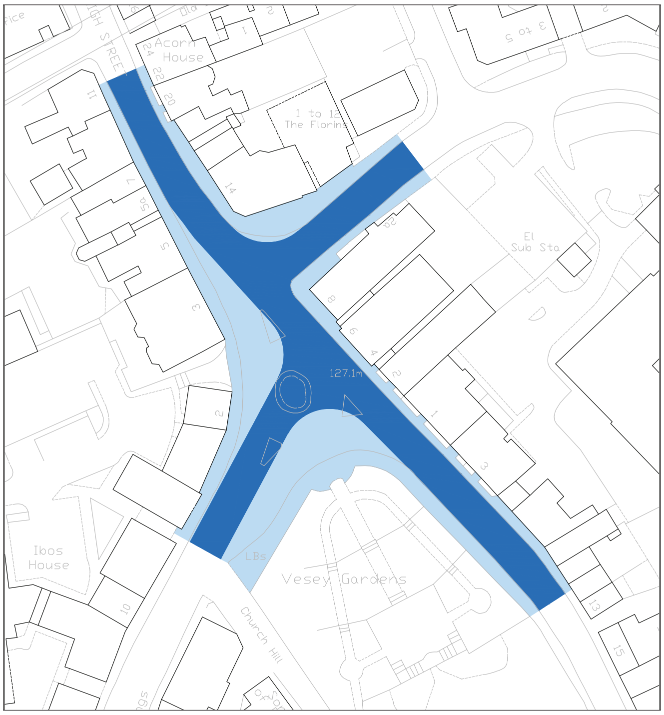


The northern gyratory link into Mill Street / High Street as it is today, primarily catering for vehicle movement. (1 of 3, continues on next page)

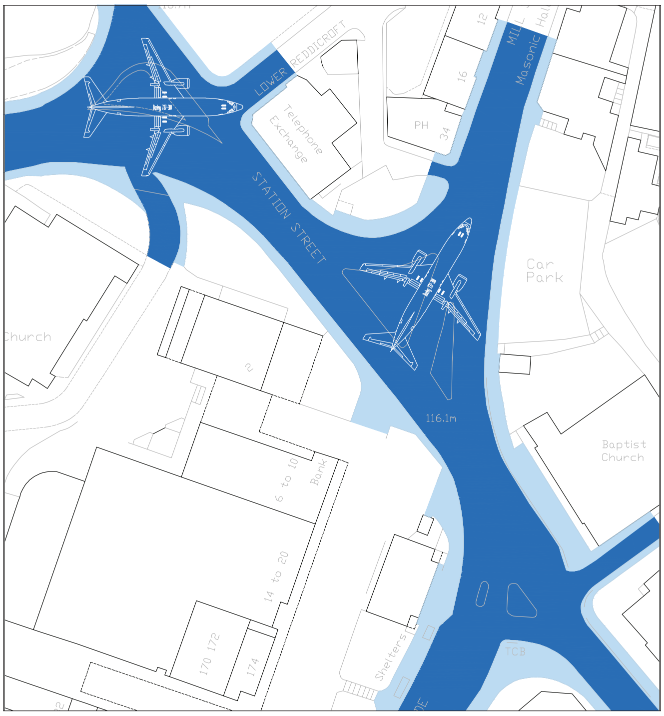
The Mill Street and High Street junction (looking towardsHigh Street) is dominated by traffic creating an intimidating environment for pedestrians.



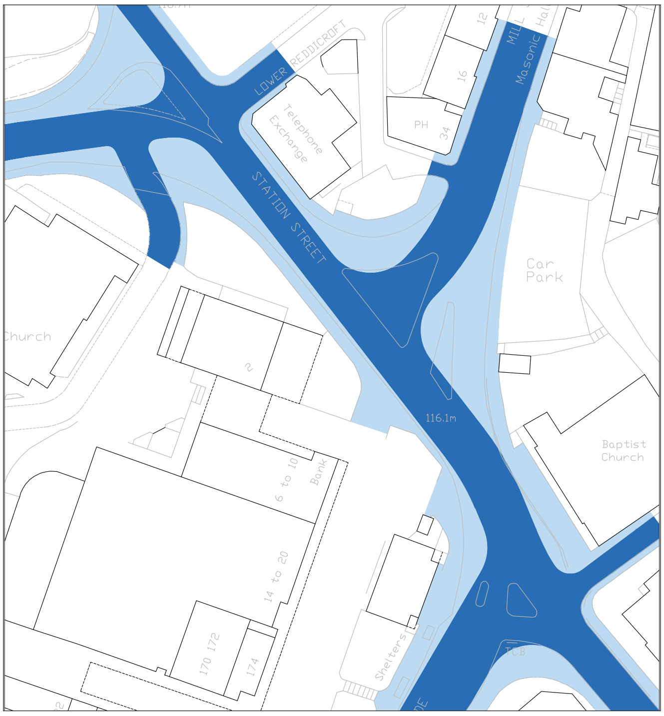
The Mill Street and High Street junction can accommodate the movement of a Boeing 737. (2 of 3, continues from last page)



The Mill Street and High Street junction as it could potentially be - with more space given over to footpaths. (3 of 3, continues from left)



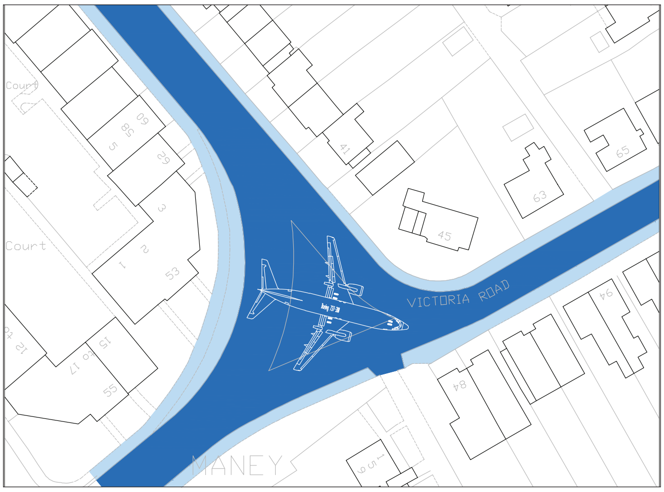
This northern gyratory link junction with Mill Street / High Street can accommodate the movement of a Boeing 737. (2 of 3, continues from last page)



This junction could be considerably rationalised to improve the pedestrian experience whilst maintaining the movement function. (3 of 3, continues from left)

There are a number of problems with this method of street design, especially in a town centre context. These include the encouragement of higher vehicle speeds and the associated impact on road safety, intimidating and hostile conditions for pedestrians and cyclists, limited opportunities for amenities such as street trees and seating, and poor air quality due to the stop-start nature of traffic that higher link speeds encourage. In some ways this approach could be justified, or at least understood, if the capacity of the surrounding radial routes that serve the town centre could match this capacity. However, they cannot. So, traffic simply races around the gyratory to join a queue at the point where it chooses to leave it.

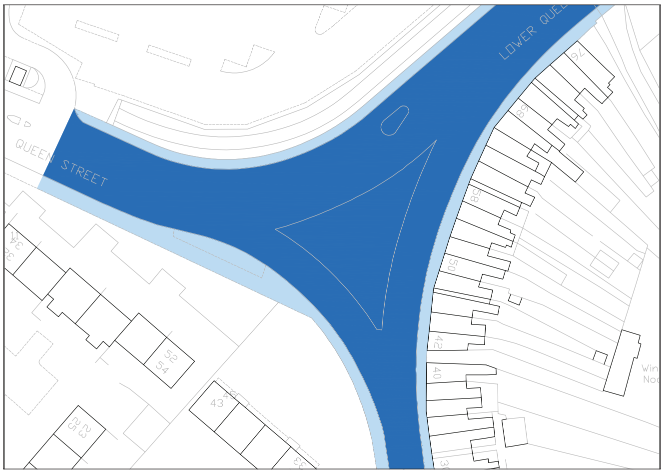
The Victoria Road / Queen Street junction is fronted by residential buildings, but operates more like an urban motorway. (1 of 3)



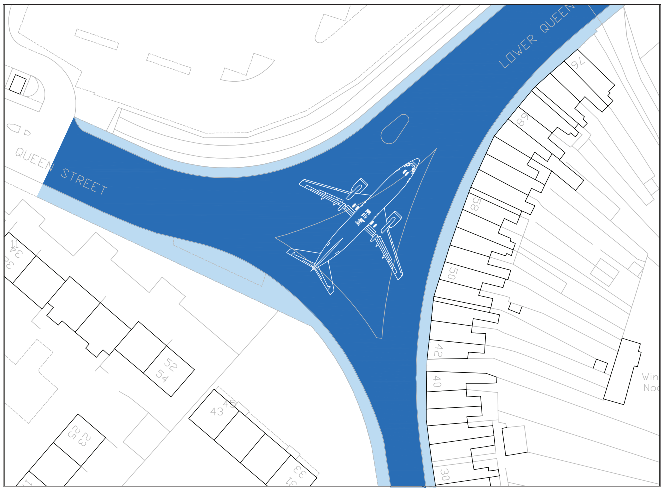
The Victoria Road / Queen Street junction can accommodate the movement of a Boeing 737. (2 of 3)

This junction could be humanised to improve the quality of life for residents, reduce vehicle speeds, but maintain movement function.

A simple counterpoint to the current 'outside-in' design would be to consider how these junctions might look if they were designed 'inside-out', i.e. began with only what was necessary for the expedient movement of a vehicles and then allocated whatever remains outside of this to pedestrians. To help articulate this alternative approach and for reasons of brevity a standard carriageway width of 7.3m has been used (traditionally the standard width of a two-lane A road in this country) and, where two streets meet, they have been joined by a 10m radius (a figure commonly used at signalised junctions). While this is relatively crude and a long way from being a finalised design (not least the probable requirement for right-turn flares), it is sufficiently robust to help articulate the scale of change that could be possible if an alternative approach was taken to the town's street design and the opportunities that it might offer the town centre. Furthermore, it is predicted that such a change could be achieved with little to no change in overall journey times through the town centre.



The junction of Lower Queen Street and Queen Street provides access to car parks, shops, and restaurants.



This Lower Queen Street / Queen Street junction can accommodate the movement of a Boeing 737.

Rationalising the junction would maintain movement functions but reduce the invitation to people to drive in line with an urban motorway.

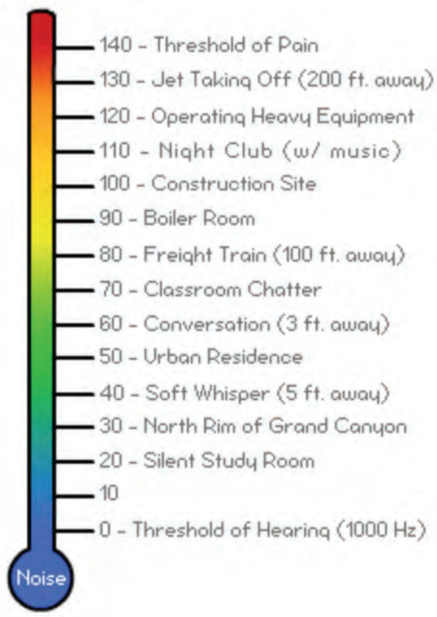
3.13 Noise

Acoustic recordings were undertaken around the main streets and ring road in the Town Centre, with the results displayed in the plan overleaf.

Most disturbingly, the ring road around the Town Centre delivered very high recordings - in between readings associated with a ‘Night Club’ or ‘Operating Heavy Machinery’.

These readings go some way to reflecting the hostile nature of the urban environment around the Town Centre, which is in turn reducing footfall in the as well as reducing the number of people crossing the ring road to access the Town Centre by foot or by bike.

Typical sound levels (dBA)



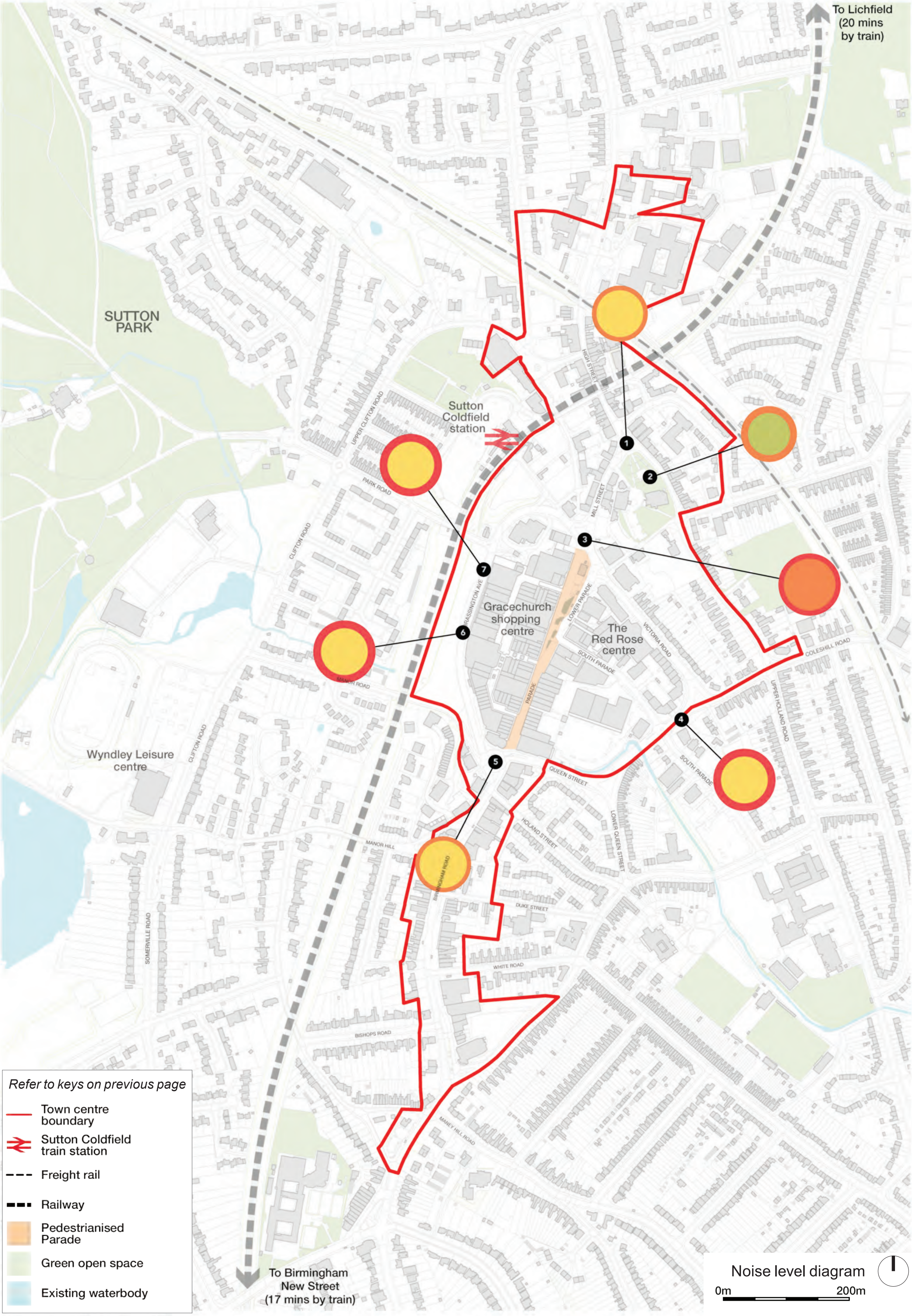
Key

Location

1. Roundabout
2. Churchyard
3. Junction
4. Ring road
5. Junction
6. Ring road
7. Ring road

Sutton Coldfield Town Centre noise level

Medium to High	<75 Db
Medium	75-90 Db
High	90-105 Db
Loud	105-120 Db
Very Loud	>120 Db


To Lichfield (20 mins by train)
SUTTON PARK
Sutton Coldfield station
UPPER CLIFTON ROAD
PARK ROAD
HIGH STREET
MILL STREET
CLIFTON ROAD
BRASSINGTON AVE
Gracechurch shopping centre
LOWER PARADE
The Red Rose centre
VICTORIA ROAD
SOUTH PARADE
PARADE
MANOR ROAD
COLESHILL ROAD
UPPER HOLLAND ROAD
Wyndley Leisure centre
CLIFTON ROAD
QUEEN STREET
HOLLAND STREET
LOWER QUEEN STREET
MANOR HILL
BIRMINGHAM ROAD
DUKE STREET
SOMERVILLE ROAD
WHITE ROAD
BISHOPS ROAD
MANEY HILL ROAD
1
2
3
4
5
6
7
To Birmingham New Street (17 mins by train)
Refer to keys on previous page
Town centre boundary
Sutton Coldfield train station
Freight rail
Railway
Pedestrianised Parade
Green open space
Existing waterbody
Noise level diagram
0m
200m

3.14 Land ownership

There are a number of significant landowners within the town centre boundary. These are outlines in reference to the identified character areas in the previous section.

Sutton College

West Midlands Police own the freehold on their police station in the north of the town centre, including a pair of semi-detached houses facing Anchorage Road. They are also looking to dispose of the site, owing to an overall reduction of police officers present on the site.

Royal Town Core

M&G Investments purchased the Gracechurch Centre in 2013. This included the office building to the northern end, which was subsequently sold on to a residential developer who has since developed this for apartments and is about to bring that to market. M&G is an investment fund with a need for cash, and not a development fund.

Birmingham City Council purchased the Red Rose shopping centre in Sutton Coldfield in early 2016. It was purchased from the Trafford Pension Fund. There were two main reasons for the purchase; one was the 'onerous' leases the City Council had within the centre on the car park and the library, and the second was to have a stake in the regeneration of the town centre.

King Edward's Independent Day School, a long-established boys school based in Edgbaston, Birmingham, has acquired landholdings across the city, including the Newhall Walk shopping centre on the south eastern corner of the current town centre. The freehold is understood to be unfettered with no known restrictive covenants. The site encompasses the units on The Parade from Aldi in the south to Waterstones in the north, the units currently occupied by B&M Bargains and TKMaxx, TGI Fridays and the extent of the car park bounded by the ring road. The lease on the whole site is held by Railpen, the rail industry's pension fund. Railpen are freeholders on the unit adjacent to Waterstones on The Parade.

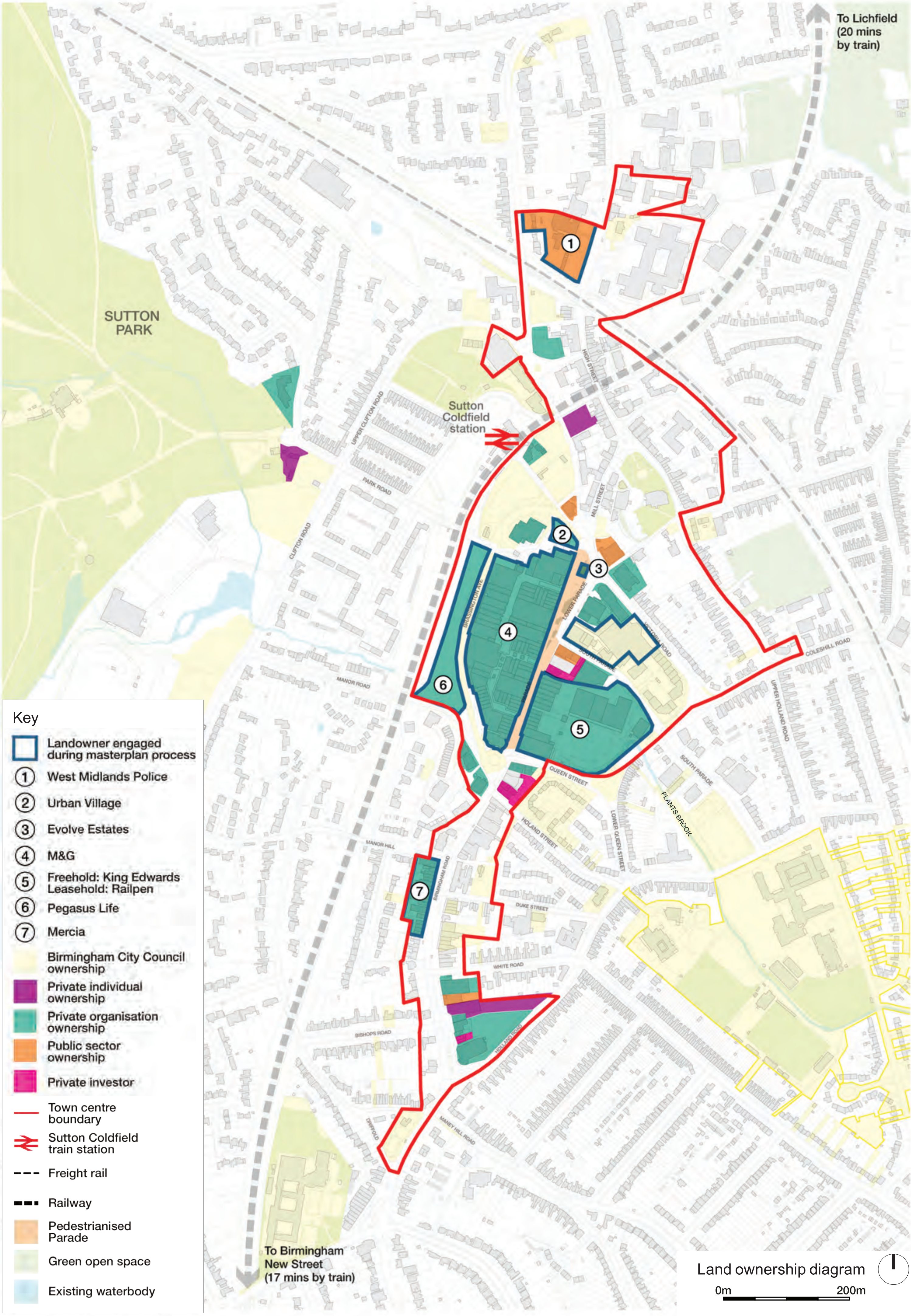
Urban Village are a local developer with an interest in at least two sites in Sutton Coldfield. The former Knights House office tower at the northern end of the Gracechurch Centre was once owned by M&G as part of the centre, but this was sold and has now been converted under permitted development rights. This is nearing completion. Urban Village also have an option on the BHS unit within the Gracechurch Centre and are exploring the possibility of residential development over the centre.

Pegasus Life own the site on Brassington Avenue and brought forward a planning application on the site for a retirement village during 2014. This received consent but has since lapsed without any start. Pegasus Life are now looking to dispose of the site but retain an active interest in it until it is sold. The sale is partly prompted by a change in the business model of the company, which is now less focused on the care sector and more widely based in the residential market.

Evolve Estates are a property investment company based in London with 70 assets across the country. The company owns several properties spread across Sutton Coldfield Town Centre including one property within the Royal Town Core; the two-storey marquee building at the north end of The Parade (1 Lower Parade); and two buildings within the Restaurant Quarter.

View of Gracechurch shopping centre from The Parade

View of The Red Rose shopping centre from South Parade



Land ownership diagram

Restaurant Quarter

Mercia Real Estate (MRE) own a continuous terrace on Birmingham Road on the western side of the road. The site, comprising numbers 10-38, currently contains a number of 1-2 storeys buildings of mixed architecture with secondary retail and commercial uses present. The block has a consistent building line to the road, but little presence. The block turns the corner at Farthing Lane, and the plot overall has relatively deep rear gardens before it rises towards Manor Hill.

As mentioned previously, within the Royal Town Core, Evolve Estates own:

- The five-storey office block at the corner of Birmingham Road and Duke Street (2 Duke Street), and
- The three-storey terrace at 47-57 Birmingham Road.

Streetscape of Birmingham Road looking south

Recently renovated office block owned by Evolve Estates which is now mixed use and residential

Birmingham Road shops

Land ownership elsewhere in the town centre

Whilst a relatively small number of landowners account for much of the Royal Town Core and some of the surrounding parts of the town centre, there remain some important pieces of land in the town centre in other ownerships, though this is piecemeal.

In order to understand this, a search of Land Registry holdings has been undertaken as part of the work. This includes land that may be strategically important to the town as the masterplan develops proposals, including land close to the current entrance of Sutton Park, the small pieces of land within the ring road that is not within one of the three shopping centres, and the land around the Empire Cinema on the southern end of the town centre.

Birmingham City Council have wide land holdings throughout the town centre, including around the station, the Trinity Church and the schools.

A number of key sites are within the land ownership of private organisations and institutions. This includes the churches and the cinema. Similarly, some land is held within financial institutions and investment portfolios.

Several sites are shown on the map in section 3.13 where planning permission has been pursued.

The market building on South Parade is outside of the ownership of the three main shopping centres within the ring road.

The City Council have landholdings outside of the ring road, including the car parks around Reddicroft and Station Street


The southern end of Birmingham Road is the 'gateway' to Sutton Coldfield Town Centre, and the land here is in several ownerships.

3.15 Uses

Assessment on the use of land and premises in Sutton Coldfield demonstrates the dominance of certain types of use in particular locations, and a notable lack of diversity across the town centre generally.

Retail dominates the Royal Town Core echoing the fact that much of this area is occupied by three shopping complexes. With the departure of several retailers (including anchor stores Marks and Spencer and BHS), vacancies are particularly notable.

Commercial (i.e. offices and workspace) dominates the land use within the Heritage Quarter and this is largely characterised by professional services and small businesses. Similar types of commercial are also seen to the south-east of the Red Rose Centre, within the same town centre block, and along Birmingham Road.

Food and beverage is located primarily along Birmingham Road, with a mix of pubs, restaurants and takeaways. There are a handful of daytime cafes located within the Royal Town Core and a small number of food and beverage establishments within the Heritage Quarter.

Each of the shopping centres has its own parking, but there is a concentration of surface car parks between the station and High Street, reflecting the protection of this land for the relief road proposed within the 2009 SPD.

As for leisure uses within the town centre, the Empire Cinema is located towards the southern end of the town centre and there is one boutique hotel (The Townhouse) which represents the accommodation offer. Sutton Coldfield Library is a significant asset for the community located within the Red Rose Centre.

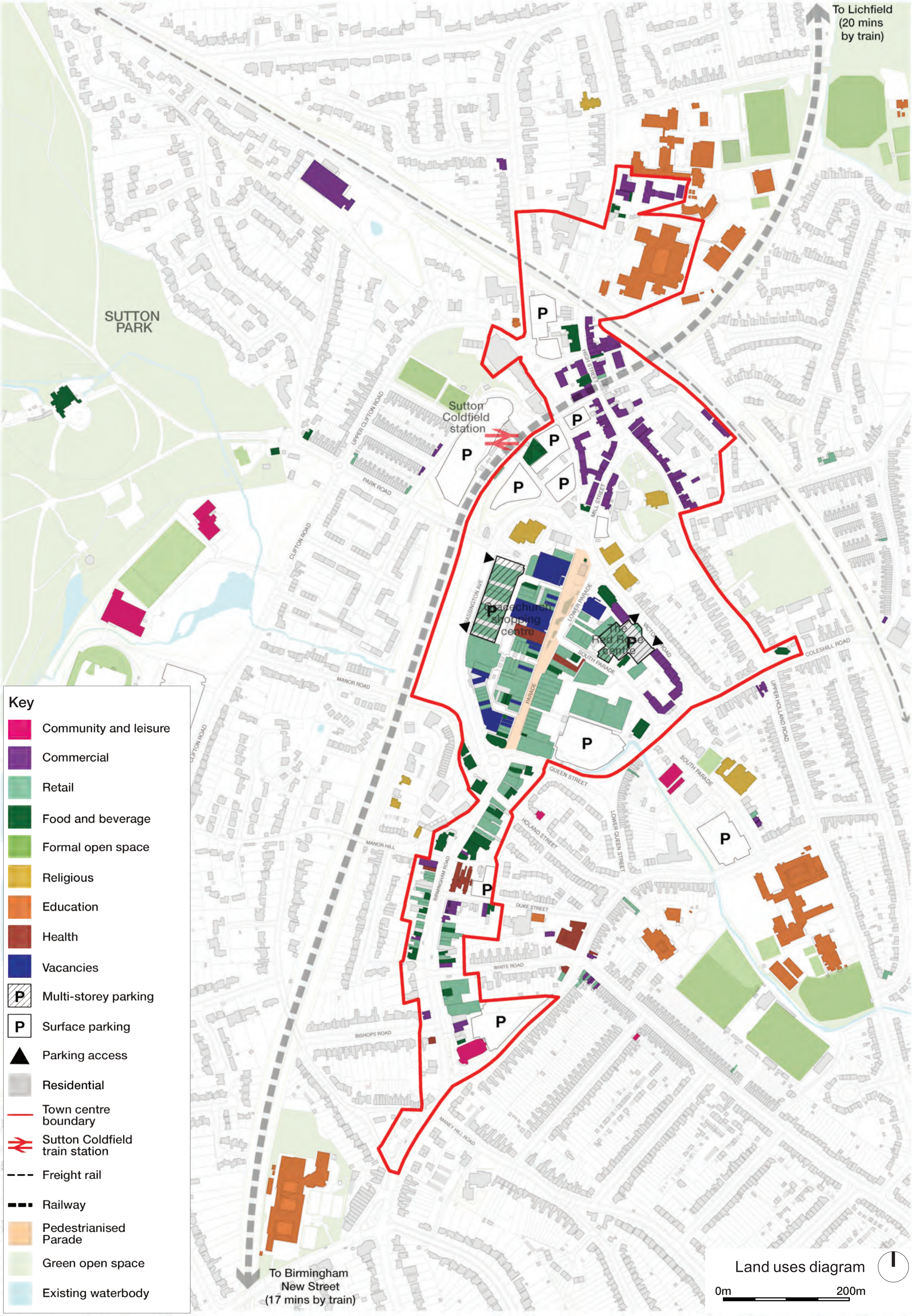
There are a handful of other community and leisure facilities just beyond the town centre including the Wyndley Leisure Centre and youth club to the west, and Sutton Arts Theatre to the east. There are also three large education establishments and a primary school within close proximity of the heart of the town centre.

Residential surrounds the town centre boundary with some solely residential buildings to the east of the town centre boundary and further south down Birmingham Road. Birmingham Road also has a number of mixed-use buildings where residential appears on upper floors.

A variety of small businesses are located on Birmingham Road

Gracechurch Centre's Parade frontage currently hosts some significant vacancies due to the loss of M&S and BHS.

Sutton Arts Theatre on South Parade is currently separated from the town centre by the ring road.



To Lichfield
(20 mins
by train)
SUTTON
PARK
Sutton
Coldfield
station
UPPER CLIFTON ROAD
PARK ROAD
CLIFTON ROAD
HIGH STREET
MILL STREET
Gracechurch
shopping
centre
The
Red Rose
centre
LOWER PARADE
SOUTH PARADE
PARADE
MANOR ROAD
COLESHILL ROAD
UPPER HOLLAND ROAD
SOUTH PARADE
QUEEN STREET
HOLLAND STREET
LOWER QUEEN STREET
MANOR HILL
BIRMINGHAM ROAD
DUKE STREET
WHITE ROAD
BISHOPS ROAD
MANEY HILL ROAD
To Birmingham
New Street
(17 mins by train)
Key
Community and leisure
Commercial
Retail
Food and beverage
Formal open space
Religious
Education
Health
Vacancies
Multi-storey parking
Surface parking
Parking access
Residential
Town centre
boundary
Sutton Coldfield
train station
Freight rail
Railway
Pedestrianised
Parade
Green open space
Existing waterbody
Land uses diagram
0m
200m

3.19 Consumer and market research

To accompany the observations within Sutton Coldfield Town Centre, and stakeholder responses regarding the current state of the town centre, market research has been conducted by SQW to understand the current health of the town centre across a number of sectors. This has been accompanied by approximately 500 face-to-face consumer surveys in the town centre, carried out by The Retail Group, to support desk-based statistics.

A summary of the findings are provided within this section with the full reports included as part of the Appendices.

Summary

The executive summary from the Market Research Report (undertaken by SQW) has been included on the following page to provide a snapshot of the conclusions drawn at the time of the research. It is inevitable that some of the factors affecting the market may change at any given time due to external events, and this should be considered when reviewing the information. These findings nevertheless have informed our understanding of the state of Sutton Coldfield's town centre and provide a basis, in addition to other research forming this Baseline Report, for the constraints and opportunities we have identified in the following chapter.

Conclusions drawn from the retail consumer survey (undertaken by The Retail Group) also contribute a large part of the understanding. Sutton Coldfield Town Centre has, in recent history, been known as a place to go shopping and this is reflected in the majority of the town centre consisting of retail, with little else with the town centre core. The headline conclusiions drawn from the consumer survey are as follows:

- Sutton Coldfield Town Centre is currently declining as a centre
- Sutton Coldfield is attracting a discerning, older customer base
- Sutton Coldfield's customers visit lots of other retail centres
- The Sutton Coldfield retail experience is underwhelming
- Sutton Coldfield Town Centre is trading on its history and reputation
- The Town Centre needs more reasons to visit

The report also identifies a number of growth opportunities which have been incorporate in the summary of opportunities in the following chapter.

Market research report provides an insight to the dynamics of Sutton Coldfield's real estate market to support to inform the master-planning process.

SQW investigated four key sectors; residential, office, retail and commercial leisure. The key findings and opportunities found in this report are illustrated below.

DEMOGRAPHY 2011-2018

0.01%

0.7%

Total population declined by 0.01%, driven by a decline in working aged population.

2.2%

Sutton Trinity Ward (town centre) experienced the largest increase in older generation population.

TOP HEADLINES

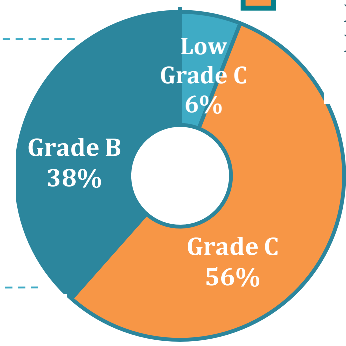
Over 5-years the price growth of flats remained unchanged at **0.0%**

100% of office stock is **Grade B or lower.**

Rental Value **£13 per sq. ft**

Vacancy Rates **1.3%**

Limited stock greater than 2,000 sq. ft



Current hotel provision: **1**

Main food and beverage offering is on Birmingham Road where road traffic dominates external environment

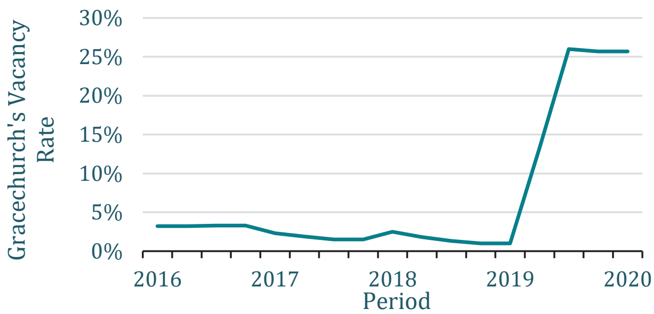
Retail stock is **30% over-supply**

Vacancy rates;

Gracechurch: **25.7%**

Sutton Coldfield: **12.7%**

Other retail parks are proving more attractive to shoppers and occupiers.



OPPORTUNITIES

Rise in demand for **town centre living**, particularly from older generations.

Review the progress of Knight's House and Langley SUE to evaluate future demand

Provide **modern, good quality, flexible** workspace that supports local businesses as they grow.

Office development should be brought forward with other development uses to safeguard viability as rental values are low

Improve leisure and culture offering in town centre and concentrate facilities to create a destination

Relocate or provide new **cinema** offer closer to the town centre to increase footfall

Increase hotel provision to accommodate visitors and business trips, benefitting from connectivity to Birmingham city centre

Create a **safer environment** and **better public realm** along Birmingham Road to improve footfall and a better experience for customers / diners

Reduce retail supply to meet local requirements. Create a **local, sustainable, and diverse** retail and leisure offering.

Executive summary extract from baseline Market Research report undertaken by SQW in the preparation of this Baseline report.

View looking north up Mill Street towards the clock tower

4 Summary of constraints and opportunities

Sutton Coldfield is a town within the West Midlands with a distinct history and an aspirational and outward-looking resident community. With a reputation for it's pleasant and green suburban neighbourhoods and good quality of life, Sutton Coldfield's declining town centre has become an issue of significant concern as it becomes victim to changes in the retail sector. It is associated with the nearby Sutton Park and has a Royal title, providing a unique status and perception which the town centre must live up to.

Sutton Coldfield was once a significant shopping centre, with two major centres – the Gracechurch and the Red Rose – offering a wide range of shops and services in covered malls alongside a more traditional high street. When these were developed in the 1970s, they were state-of-the-art and responded to the type of consumerism that people desired, and the ring road that came along was supposed to enable people to access town by car, and park, easily and efficiently.

As technology and tastes have changed, and convenient out-of-town retail parks have been built, Sutton Coldfield's offer has found itself unable to adapt quickly enough to remain attractive. Society's increasing awareness of the negative environmental impacts in the way we live have also been a major growing issue which the town centre has failed to respond to within the built environment.

Through the baseline research and analysis of information garnered from site visits, understanding the growth and history of the town, reviewing planning policy, undertaking market research, carrying out consumer surveys, assessing the built environment and transport infrastructure, and from initial engagement with the TCRP and landowners, the consultant team has been able to establish Sutton Coldfield Town Centre's strengths, weaknesses, opportunities and threats (SWOT). These are summarised as constraints and opportunities within the following concluding chapters of this Baseline Report and form the basis for which to test and develop the masterplan ideas in further consultation with stakeholders, landowners and and the local community.

Sutton Coldfield lacks an established identity despite its extensive and distinct history


The dominance of vehicles in the town centre creates a strong sense of disconnection across character areas.


Despite having a reputation for being a significant shopping centre, changes in the retail sector has had a detrimental impact.

4.1 Summary of constraints

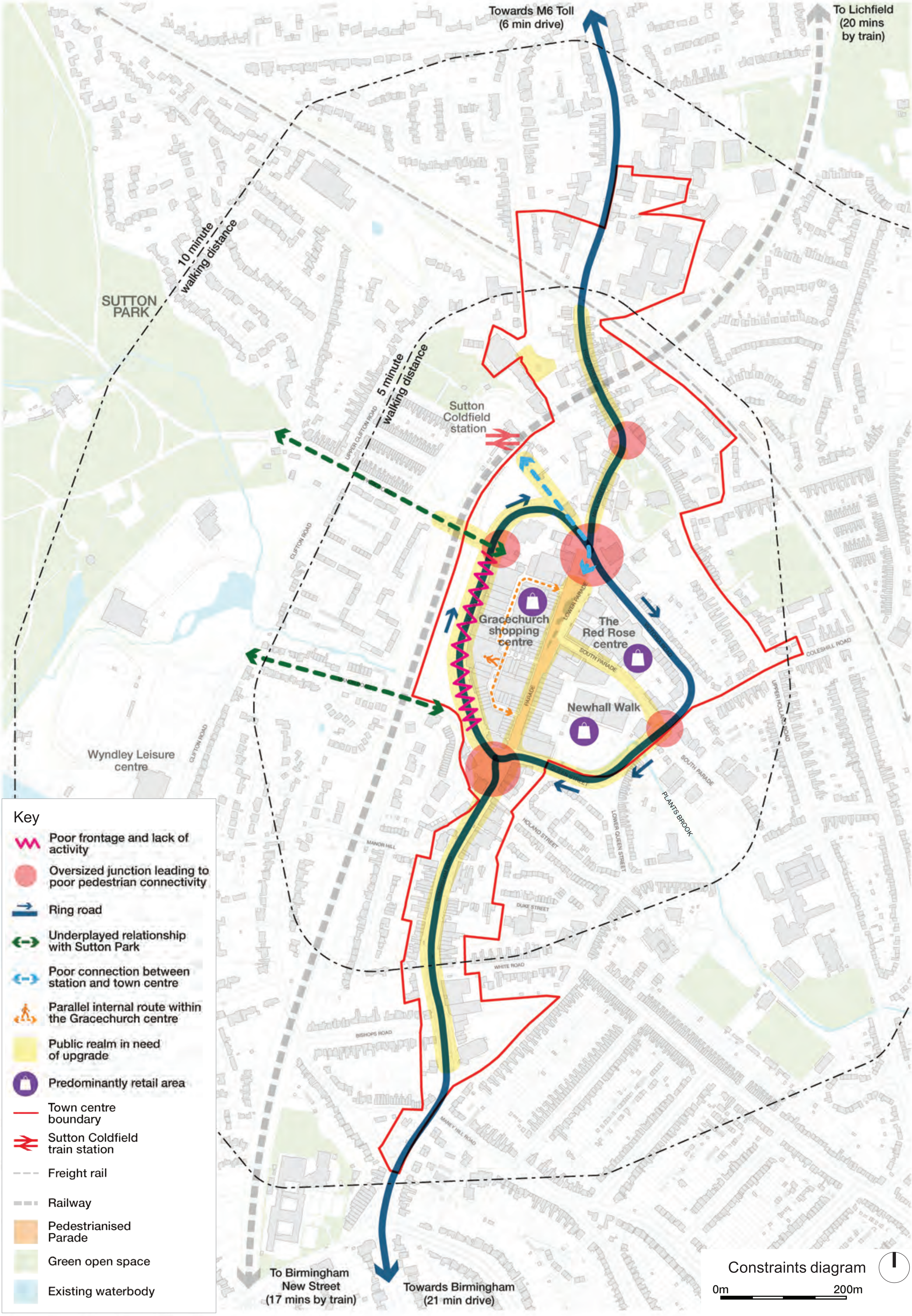
The town centre faces various constraints that hinder its ability to thrive. By identifying these constraints, this masterplan highlights the challenges posed and proposes what could be done to overcome them.

Transport infrastructure and connectivity

- The ring road severs the Royal Town Core from the surrounding character areas, making the town centre feel physically and psychologically disconnected overall. The nature and route of the ring road provides a poor sense of arrival to the Royal Town Core from all directions and by all modes of transport.
- The combination of wide carriageways, wide junctions, and narrow footpaths creates an environment which encourages fast-moving traffic. This subsequently creates an unsafe and unattractive environment for pedestrians and cyclists, which further allows traffic to dominate the town centre streets. This environment is prevalent along the entire ring road, as well as within the Heritage Quarter which particularly undermines and detracts from the attractive built heritage in this area.
- The oversized nature of many of the road junctions within the town centre makes it difficult to cross streets, move between character areas, and access Sutton Park as a pedestrian. Where there are crossings, they are often not located along desire lines. Birmingham Road benefits from wide pavements, but the lack of dedicated pedestrian crossings to connect both sides of the street undermines the public realm environment and likely the many businesses which would benefit from pedestrians being able to cross the road more freely.
- The close physical relationship to Sutton Park is not apparent within the town centre environment through greenery (refer below) or even through signage to indicate the park as being a mere 5 minute walk away. Station signage labels the stop "for Sutton Park", however if exiting the station onto Station Street, it would be hard to know where the park was located without looking at a map.


The exit ramp from the Gracechurch Centre car park which joins the three-lane carriageway on Brassington Avenue

Crossing Brassington Avenue from Park Road is difficult due to lack of designated crossings, the wide three-lane carriageway, and fast moving traffic



Towards M6 Toll
(6 min drive)
To Lichfield
(20 mins
by train)
10 minute
walking distance
SUTTON
PARK
5 minute
walking distance
Sutton
Coldfield
station
UPPER CLIFTON ROAD
CLIFTON ROAD
Gracechurch
shopping
centre
LOWER PARADE
The
Red Rose
centre
SOUTH PARADE
PARADE
Newhall Walk
COLESHILL ROAD
UPPER HOLLAND ROAD
Wyndley Leisure
centre
CLIFTON ROAD
MANOR HILL
HOLLAND STREET
LOWER QUEEN STREET
PLANTS BROOK
SOUTH PARADE
DUKE STREET
WHITE ROAD
BISHOPS ROAD
MANEY HILL ROAD
Key
Poor frontage and lack of
activity
Oversized junction leading to
poor pedestrian connectivity
Ring road
Underplayed relationship
with Sutton Park
Poor connection between
station and town centre
Parallel internal route within
the Gracechurch centre
Public realm in need
of upgrade
Predominantly retail area
Town centre
boundary
Sutton Coldfield
train station
Freight rail
Railway
Pedestrianised
Parade
Green open space
Existing waterbody
To Birmingham
New Street
(17 mins by train)
Towards Birmingham
(21 min drive)
Constraints diagram
0m
200m

Poor public realm

- The public realm is generally poor and unattractive, and does not convey Sutton Coldfield as the largest town centre outside of the City, let alone its 'Royal' title. The lack of pedestrian and cycle infrastructure and its consideration dissuades walking and cycling to and around the town centre, increasing reliance on private vehicles leading to traffic congestion, poor air quality, and potentially poor health outcomes for residents.
- Despite the green setting and the proximity of Sutton Park, street trees and landscaping are conspicuously absent from the town centre. Residential streets and neighbourhoods immediately adjacent to the town centre boundary, on the other hand, are attractive and green.
- The general absence or poor provision of street furniture, places to sit, and play features also contributes to the uninviting nature of the public realm and discourages people from spending more time than necessary within the town centre.
- Changes in topography can often provide an opportunity to create an interesting space for people to meet, or sit out during nice weather. The topography change between Lower Parade and The Parade with its steps and fenced-off landscaping, however, feels more like a barrier which physically disconnects the two spaces creating two distinct environments, with buses and associated activity dominating Lower Parade.

Lack of identity and heart

- From conversations with stakeholders as well as site visits, it is clear that Sutton Coldfield lacks a clear identity, as well as a physical 'heart'. Despite The Parade being a large, albeit linear, non-vehicular space, it fails to present itself as the town centre's 'heart' or as an obvious location for community events and gatherings. While the town centre hosts occasional markets, the day-to-day appearance and activity along The Parade does not communicate itself effectively as an important civic space. No other spaces within the town centre offer a suitable alternative.
- Due to the design of the ring road being focused on getting traffic through the town centre quickly and with minimal interruptions, it is hard to distinguish where the town centre starts and ends. There are no significant gateway features and it would be no surprise that people driving along the ring road may not even notice the presence of the town centre at all. The out-of-town retail park-style appearance of Newhall Walk along Queen Street, and the lack of frontage provided by the Gracechurch Centre onto Brassington Avenue undoubtedly supports this perception.

Retail and the 'big three'

- Retail uses are dominant within the ring road and the Royal Town Core, and with changes to the sector and competitors in neighbouring areas, Sutton Coldfield is losing its ability to attract visitors for its retail offer alone.

Station signage hints that Sutton Coldfield is the stop for Sutton Park.


The junction where Mill Street, Queen Street and The Parade meet is hugely oversized and creates a sea of tarmac instead of creating the perception of a people-friendly town centre environment.

This may be heightened by shortfalls in the diversity of the overall town centre offer, despite pockets of eating and drinking establishments in the Restaurant Quarter and commercial premises in the Heritage Quarter. The lack of leisure, including family leisure and visitor accommodation, and cultural amenities is distinct.

- Consumer trends now look towards providing 'convenience' and 'experience', both which Sutton Coldfield fails to provide due to the poor pedestrian and cyclist infrastructure and presence of typical high street or 'chain' brands.
- The remaining retail offer is mismatched with the affluent local residential community. There are minimal independent and boutique retailers, unlike in Boldmere Green where there is a high proportion of independent businesses and few vacancies.
- The physical make-up of the Royal Town Core is dominated by the 'big three' shopping centres (i.e. the Gracechurch Centre, the Red Rose and Newhall Walk), and only the Red Rose Centre is publicly owned limiting the scope of direct intervention by the masterplan.
- The Gracechurch Centre makes up a significant part of the Royal Town Core and it's parallel internal mall arrangement to The Parade is problematic as it requires the need to create and maintain additional active frontage and positive development edges.
- The Brassington Avenue edge of the Gracechurch Centre, as mentioned previously, provides no activity except for the movement of cars in and out of the private car park. This creates a poor and lifeless environment along Brassington Avenue, exacerbated by the wide three-lane carriageway and narrow footpaths. This makes the vacant Brassington Avenue site even more difficult to deliver than when merely considering its constrained location next to the railway and steep embankment.
- Retail uses are generally limited to daytime hours and with retail being the predominant use within the Royal Town Core, there is little to no activity after hours along The Parade, despite a comparatively bustling restaurant and pub scene on Birmingham Road. Stakeholders have reported that there is an issue with anti-social behaviour around the McDonalds on Lower Parade (i.e. by the bus stops) during the evenings.

Non-physical threats

- Due to high volumes of traffic travelling along the ring road, noise and air pollution are at dangerous levels in these areas.
- The declared climate emergency by Birmingham City will be an important consideration for proposals for changes to Sutton Coldfield Town Centre, as well as on new development. Resilient and flexible design will be required to be as future-proof as possible to ensure the town centre will be robust to changes in response to the climate emergency and any unforeseen events. Trees and shade should be provided in anticipation of rising temperatures, and SUDS (Sustainable Urban Drainage Systems) should be integrated in any public realm design to anticipate increased surface water flood risk.

Few businesses along The Parade are open in the evening which creates a quiet and vacant Royal Town Core, despite the presence of restaurants and pubs along Birmingham Road closeby.

Market Village on South Parade has many popular stalls within, including a zero waste shop.

4.2 Summary of opportunities

Sutton Coldfield benefits from a number of strengths including being well-connected by public transport and road infrastructure, having a number of large open green spaces nearby including Sutton Park, having popular and centrally-located schools, and generally being a desirable place to live.

An enthusiastic and affluent community

- Sutton Coldfield residents are loyal, proactive, and enthusiastic to see positive changes made to ensure the long-term sustainability and viability of their town centre. The majority of residents living within the core catchment are particularly discerning and affluent, at levels considerably above the UK average. As consumers, they tend to be well-educated, well-travelled and have high expectations of service and quality. This suggests that a diversified retail offering which targets high quality, boutique and specialist services, e.g. bakeries, butcheries, delicatessens, health and beauty, etc, could succeed in Sutton Coldfield.
- Sutton Coldfield Library is highly regarded by the community and FOLIO Sutton Coldfield runs a well-attended programme of events. There is an opportunity to build on this strong sense of community by building a new combined purpose-built library and community facility which has a visible and prominent face onto the public realm. It could host a number of different community-focused services including drop-in health service providers to increase accessibility for residents.

Nature in the town centre

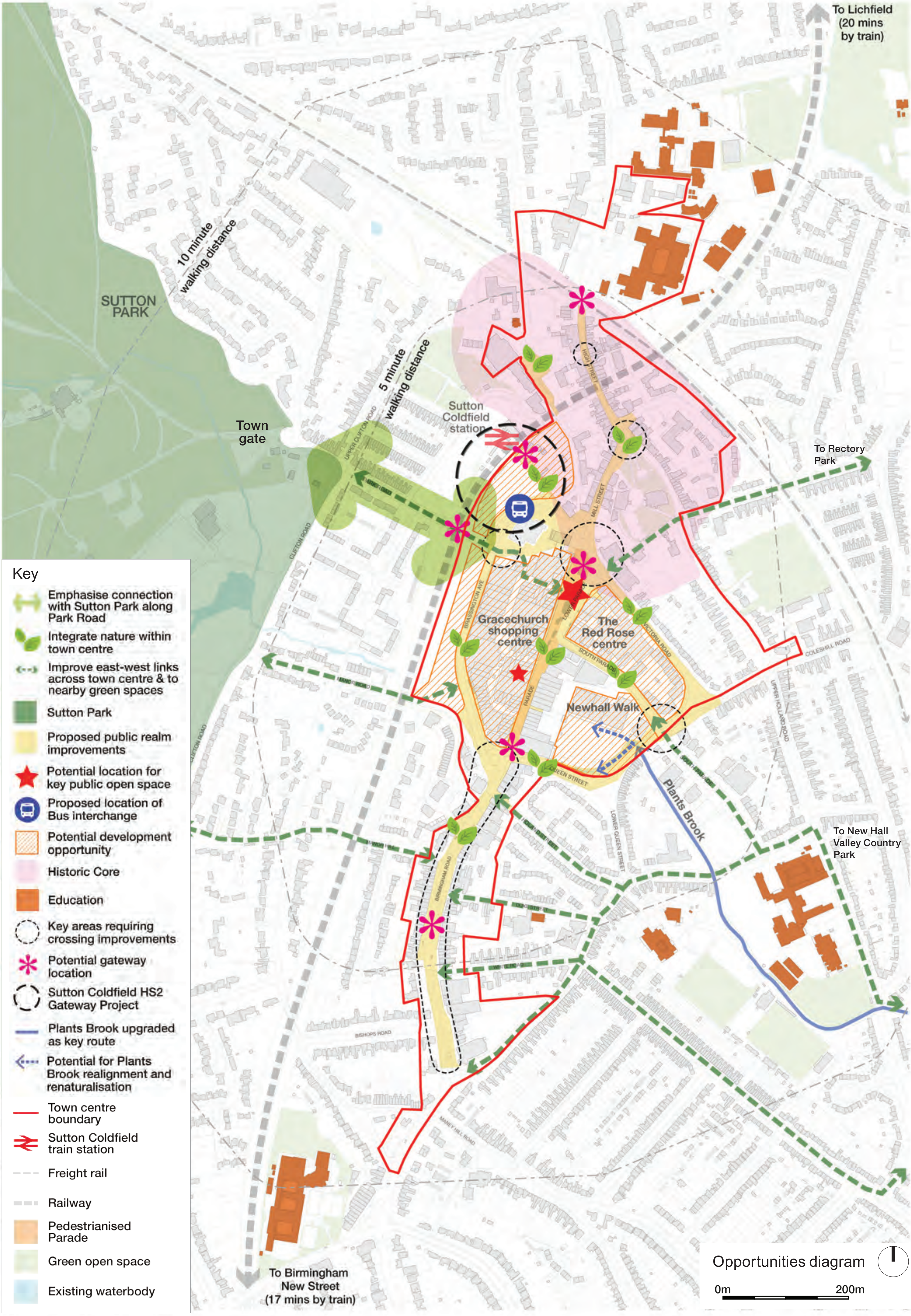
- Being in close proximity, and a destintation in its own right, Sutton Park should have an obvious and more visible presence within the town centre to reinforce the proximity of each to the other. This could be achieved by bringing more natural features into the town centre, such as integrating more trees or planting within all streets, alongside street furniture which features natural materials and/or motifs, to convey a strong visual association with the park.

King Edward Square with war memorial in front of the former hotel (now private apartments) in the town centre's historic core

- Plants Brook, a culverted stream which can be seen along the Queen Street edge of Newhall Walk, is one of few natural features within the town centre and should be celebrated as such. It could be uncovered and realigned to be made into a distinct feature which brings nature and added value to its surroundings, including potential future development at Newhall Walk.
- The need to consider the climate emergency and unpredictable changing weather patterns, which are already bringing hotter temperatures and increased rainfall, insists on the need to design for climate resilience. This includes integrating more trees and Sustainable Urban Drainage Systems (SUDS) for shading and managing increased surface water flooding. These should be considered as key design opportunities to create multi-functional features within the townscape which can provide informal play spaces or pleasant areas for resting and meeting others.

Creating a people-focused town centre

- With road carriageways overly wide and footpaths being overly narrow in places, there is an opportunity to reclaim part of the carriageway for cycle ways and/or widened footpaths. Widened footpaths would create a safer and more pleasant walking environment and provide space for street furniture and/or businesses to spill-out onto the pavement. The presence of street furniture (and trees, refer above) will help to create an attractive people-focused town centre environment



Opportunities diagram

which will help to naturally calm traffic and cater for more people to be able to travel without the use of their cars, reducing traffic congestion and improving air quality.

- Improving and tightening road junctions so they are still functional for traffic but are easier to cross for pedestrians will help to create a more integrated town centre. Better crossings will also help to connect residential, working, and school populations to the town centre to help increase the viability of shops and businesses.
- The lack of gateways and visibility of the town centre undermines its importance within the Birmingham region. Gateways, and other landmark features, should be identified and developed to be distinctive to Sutton Coldfield Town Centre, and could include interventions within the public realm, built development, public art and signage. These changes will help advertise and announce the town centres presence and offer. Public art could be designed with input from community groups and utilised to communicate Sutton Coldfield's identity and their pride as a community.
- Wayfinding signage will also help to ensure all parts of the town centre and nearby destinations are equally accessible and prominent. Providing signage which shares the distance and travel time will encourage more people to walk and cycle once they know how close everything is.
- A strategic cycle route connects Sutton Park to New Hall Valley Country Park to the east, which is located nearby proposed Langley SUE and Peddimore developments. Ensuring this link is legible, direct and well signposted will be important in establishing this connection as a key link to and from the town centre.
- With proposals to shift the bus interchange closer to the station, Lower Parade can be relieved of high volumes of through traffic and transformed into an attractive public open space. By rethinking the change in levels between The Parade and Lower Parade, this area could be opened to create an expansive town square and public 'heart' to Sutton Coldfield which could host markets and other community events and festivals.

Development opportunity sites

- The Red Rose Centre is in public ownership and is therefore a major opportunity for regeneration within the town centre. It is large, prominent, and well-located being within the heart of the Royal Town Core and therefore in excellent proximity to the train station.
- The Gracechurch Centre occupies such a large area within the Royal Town Core that its role within the town centre regeneration should not go understated. A number of constraints (refer previous chapter) hold it back however these should also be seen as opportunities. It's extensive façade along Brassington Avenue should be an opportunity to signpost the town centre with a positive frontage and create activity, with the potential to create direct routes through to The Parade. Its large vacant units should be considered for short-term interventions which could test alternative

The pedestrianised Parade has the potential to be an attractive public open space

The Knight's House building (right) formerly contained offices, however this has now been converted to residential uses before committing to more long-term changes. They could provide temporary indoor marketplaces or leisure uses to entice families and young people to visit and spend time within the town centre.

- Newhall Walk is also a prominent site as the interface between the Royal Town Core and adjacent residential communities. Newhall Walk must continue to provide direct and clear connections to South Parade.
- The vacant land along Brassington Avenue is a key site which, if combined with improvements to the streetscape and Gracechurch Centre, would help to create a positive and vibrant extension to the town centre.
- New development should respond to the climate emergency and zero-carbon aims established by Birmingham City Centre. Buildings should consider innovative design and use of materials to ensure long-term flexibility, reduced embodied carbon, and minimum requirements for energy use and future maintenance. Where possible, development should integrate nature-based solutions such as green roofs and walls, and SuDS within landscaping.

Creating a mixed-use diverse town centre

- Market research and consumer survey findings support the possibility of a diverse range of uses within the town centre. Due to high market value, residential uses are likely to be a good investment for land owners and would benefit the town centre by increasing the immediate catchment for businesses and facilities. New homes could cater both for affluent downsizers as well as young professionals and families who work nearby or in Birmingham City Centre.
- Potential for local employment growth has been identified in the professional, scientific and technical, and information and communication sectors. Combined with an absence of high grade office space this provides an opportunity. Anecdotal evidence also suggests that existing businesses are unable to find suitable premises to expand into. Frequent rail connections to Birmingham City Centre suggests that Sutton Coldfield would be a suitable satellite location for large businesses, as well as for start-ups seeking to be close by.

Exchange, Aylesbury: Latest stage in the long development of the Waterside providing theatre, hotel and food store and improved public realm and connectivity to core retail area

Barcode, Plymouth: purpose-built leisure attraction for the city centre including cinema, 'urban' golf, restaurants and car parking


Cathedral Quarter Blackburn: new quarter for the town centre including hotel, food and drink and new public realm

View towards High Street from Vesey Gardens

- The hotel and commercial leisure market has been growing in the Birmingham City Centre due to increased business and visitor demand. In Sutton Coldfield Town Centre, there is currently only one hotel: the Townhouse on High Street. Being in close proximity to Birmingham City Centre and with Sutton Park on its doorstep, a hotel could be an attractive prospect within the Royal Town Core and would support an increased evening economy.
- A lack of choice for daytime cafe offerings is a major shortfall and opportunity for the town centre, particularly due to the number of businesses and affluent retirees providing a good customer base. With most of the restaurant and pubs located along Birmingham Road, the town centre would benefit from more options located within the Royal Town Core and in close proximity of the station. If culture or leisure uses, such as a new boutique cinema or theatre, were also located centrally within the Royal Town Core, this combination of uses could create a lively evening economy which would in turn make town centre streets safer in the evening.
- Other opportunities are in the health and fitness and family entertainment leisure sectors. The recently opened Gym Sutton Coldfield has been hugely successful. Family entertainment is absent from the town centre with stakeholders confirming a lack of attractions for children and young families.

Funding and potential investment

- Public sector funding to develop the Sutton Coldfield HS2 Gateway proposal has been identified. However, the delivery of the project is currently unfunded. Further funding will need to be secured to deliver the upgrade of the public transport interchange facilities and ensure Sutton Coldfield and its surroundings are well connected.
- The significant development of Langley SUE and Peddimore will potentially attract investment to the town centre, provided connections between the town centre and the new developments are well-established to create a strong relationship for residents, visitors and workers.

Heritage and the 'Royal' title

- The Historic Core is an attractive concentration of built heritage within Sutton Coldfield and should be celebrated as part of the town centre's identity.
- Sutton Coldfield's 'Royal' title and distinct history, while present within some of the built fabric, could be more effectively communicated as part of a Heritage Centre to create a destination for both residents and visitors.

4.3 Developing the objectives

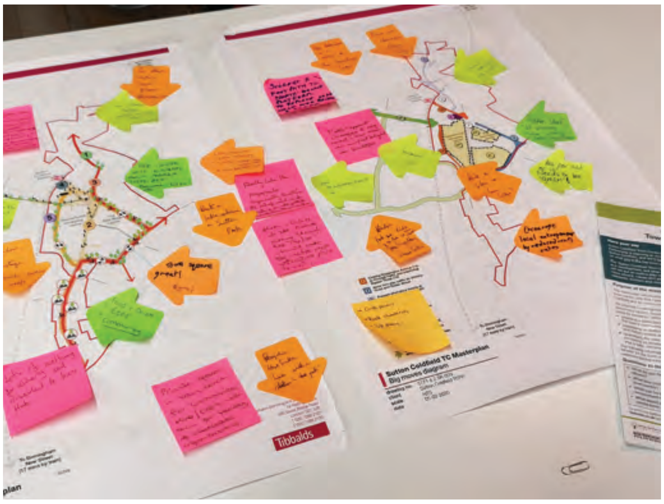
Having established our baseline understanding of Sutton Coldfield Town Centre and its key constraints and opportunities, the consultant team set out to develop the initial thinking on the masterplan's objectives. Collectively, it was agreed that the focus needed to be on:

- Overcoming barriers – especially the ring road – to reach out from the centre to other areas diversifying Sutton Coldfield's offer so it strengthens its position in the hierarchy, competing effectively with similar towns and complementing the local offer;
- Drawing out Sutton Coldfield's heritage, history and character, and providing an environment that makes the most of it;
- Challenging established thinking about the way things are done to move forward in a sustainable and compassionate way;
- Publish and promote Sutton Coldfield's attractions, i.e. many reasons to visit the town centre; and,
- Creating a mix of uses that offers everyone who lives, works and visits the quality of experience they'd expect from a functioning, healthy town centre.

Or simply:

- Connecting
- Celebrating
- Communicating
- Clarifying
- Complementing
- Community

These objectives were presented, initially as 'themes', to the Town Centre Regeneration Partnership in early December 2019 and were agreed to be used as the basis for developing the masterplan and its projects further. These six 'C's, with their detailed explanations (refer to the following page), will also be useful to help communicate the initial thinking and proposals for Sutton Coldfield Town Centre in the next stage of work which involves detailed engagement with stakeholders, including workshops and conversations with the local community, where we will be seeking feedback to inform the final masterplan proposals.



Gathering and recording feedback through post-it notes.

Post-it workshop with the Town Centre Regeneration Partnership identifying priorities for the future of Sutton Coldfield.

Connecting

- Connect the Parade, the station, Birmingham Road and Sutton Park through active street frontages, minimising perceived distances and improving the overall built environment
- Improve connections between green spaces, the town centre and public transport hubs
- Present an alternative solution to the relief road and reduce the dominance of vehicles
- Establish strong connections to Langley and Peddimore
- Encourage people to move around by foot or bike within a safe, attractive, convenient and enjoyable public realm
- Overlap the character areas and move the priority towards pedestrians
- Reduce the dominance of through-traffic and the barrier effect of the ring road

Communicating

- Publishing and promoting Sutton Coldfield's attractions - the markets and festivals, the magnificent parks and the evening economy
- Increasing its appeal to residents, giving people a reason to come and come back
- Ensuring partners work together to a common vision
- Using effective methods to promote the town centre

Complementing

- Supporting the strategic framework for the city centre with local services and housing choices
- Complement local centres by providing a town wide focus and greater choice
- Attract people to live, work and spend time in the centre, contributing to and supporting the local economy
- Make Sutton Park a part of the town centre experience
- Ensure the historic town is part of the perception of the town centre's identity

Celebrating

- Celebrate the town's heritage, history and character in an environment that endorses it
- Define its identity as a characterful and unique place to live, ensuring local people appreciate its value and are proud to be residents
- Promote and support events such as markets and festivals (including arts, food and literature)
- Highlight the town's relationship to Sutton Park by drawing nature into the town centre

Community

- Providing attractive public squares, where people can sit and meet for community events, markets and outdoor performances
- Encourage more people working and studying in and around the town centre to visit during the day
- Invest in the library as a significant community asset and a catalyst for improving community and cultural uses
- Recognise local community groups who are actively investing their time and energy

Changing

- Change the town centre offer to reflect how people live, shop and spend their free time
- Provide flexibility in town centre planning policy, encouraging a more rounded experience
- Use daytime populations associated with office and educational uses to strengthen the town centre's diversity
- Provide suitable spaces for existing companies to grow, enabling them to stay and new companies to move in
- Diversify the retail offer with suitable spaces for independent retailers and start-ups

Proposed town centre objectives

A Appendix

A1 Early engagement

A1.1 What is Sutton Coldfield to you?

Engagement in the early stages of the project has been limited to landowners and stakeholders within the Town Centre Regeneration Partnership. During an initial meeting with the group, members were asked to answer the above question with three short phrases. We collated their responses and generated ‘word clouds’ (right) to communicate the positive (blue) and negative (red) feedback. The size of the word within the word-cloud reflects the frequency of the comment amongst members.

Positives

- Sense of community
- Sutton Park; the park is the immovable object, the attractor, Sutton Coldfield is green.
- Home
- Friendly community
- Potential for improvement
- Mere Green and Boldmere, all part of Sutton Coldfield
- Schools
- Great place to work (business owner)
- Hidden gem (resident)
- Beautiful surroundings, green areas (resident)
- Understated
- Well connected
- Churches

Negatives

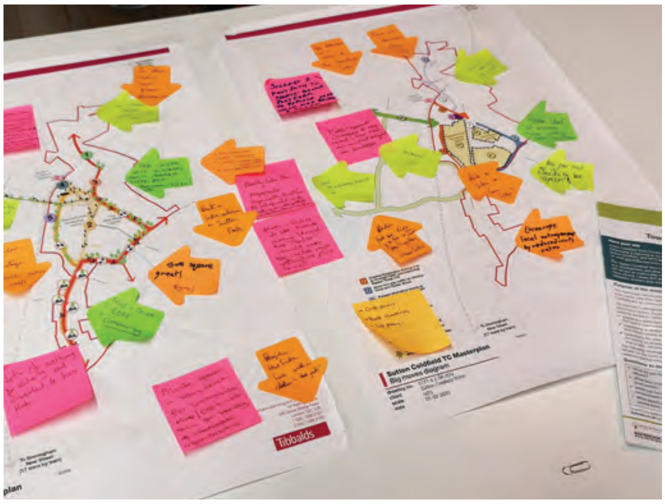
- Lacking resources locally (resident)
- People of Sutton Coldfield think they are better than others (resident)
- Concrete, car-dominated environment
- Isolated by ring road
- Poor legibility
- Poor public realm
- Outdated and in need of investment
- Lack of identity
- Constrained
- No real heart
- Dying town centre

A1.2 What is your vision for Sutton Coldfield?

Following the initial exercise, members were then asked “what do you want Sutton Coldfield to be in the future?” in three or so words. The responses were collated to generate a third ‘word cloud’ (green, previous page) and are summarised below.

Vision

- Have a clear identity and offering; be unique
- Good quality
- A green centre that is unique, varied and vibrant
- Engaging, varied & pleasant
- Vibrant, accessible & appealing
- Welcoming, safe & social
- Distinctive, vibrant, lively, green; something for all
- Vibrant, exciting and thriving
- Attractive destination
- Sense of community
- Safe, green, clean & welcoming
- Focus on being environmentally friendly
- Outward looking
- ‘Happening’
- Open hours outside 9-5
- Walkable & creative



Gathering and recording feedback through post-it notes.

Post-it workshop with the Town Centre Regeneration Partnership identifying priorities for the future of Sutton Coldfield.

A2 Consumer survey report (The Retail Group)

THE RETAIL GROUP

informed solutions

Sutton Coldfield Growth Opportunities

Draft Report V1

Prepared on behalf of

ROYAL SUTTON COLDFIELD TOWN COUNCIL

January 2019

Report Contents

1.0 Introduction to The Retail Group

1.1 Experience and Credentials

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

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

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

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

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

2.0 Project Background and Objectives

2.1 Project Background and Approach

The Retail Group is part of a team led by Tibbalds tasked with delivering a masterplan for Sutton Coldfield.

This report provides a variety of baseline data on the existing Sutton Coldfield consumer base, catchment area and existing retail offer, including improvements needed to the offer to ensure it matches the future needs of its consumers.

2.2 Project Objectives

The Retail Group's project objectives are

- Identify which consumers are currently visiting Sutton Coldfield Town Centre and why
- Identify their shopping habits, as well as the improvements they want
- Identify the actual shopping catchment of Sutton Coldfield
- Compare the profile of visitors to the catchment as a whole
- Assess the existing offer to identify issues, weaknesses and improvements needed
- Provide an overview of emerging consumer and retail trends that are effecting future consumer need in regards town centres
- Review a series of relevant benchmark centre offers to provide pointers for future development and growth
- Given the outputs of the above, assess how Sutton Coldfield Town Centre can improve and grow in light of its potential customer base and their future needs

3.0 Consumer Survey

3.1 Introduction and Methodology

To identify who is currently visiting Sutton Coldfield Town Centre and how they shop it, we commissioned an independent survey of circa 500 visitors to the town centre. The plan opposite shows the three research zones employed.

Surveys were carried out weekdays and weekends from 10.00 to 17.00, with circa 10% of the surveys being undertaken between 19.00 and 21.00 in Birmingham Road restaurant cluster.

Appendix 1 contains a copy of the survey.

Respondents were questioned on their main reason for visiting the centre, frequency of visit, changes to frequency of visit, other centres visited and improvements that would encourage more visits.

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

3.0 Consumer Survey

3.2 Sample Profile

In total, 527 consumers were actually stopped and their responses included in the survey.

Of these 66% were female and 34% male.

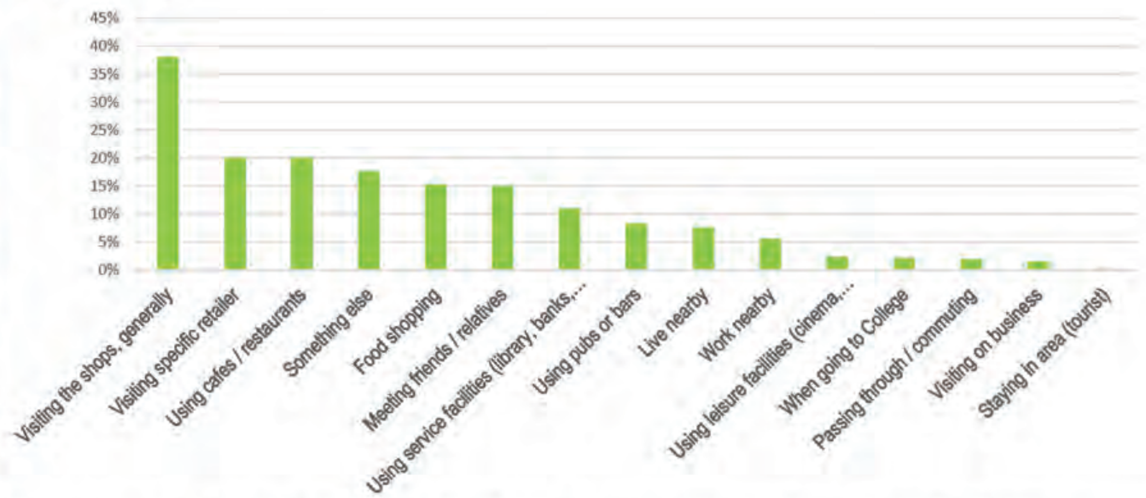
The age split was 18-25 (12%), 26-44 (25%), 45-64 (32%) and 65+ (31%).

69% were surveyed on weekdays, and 31% on weekends.

248 were surveyed in the Gracechurch Centre, 213 were in The Parade and 66 on Birmingham Road.

3.0 Consumer Survey

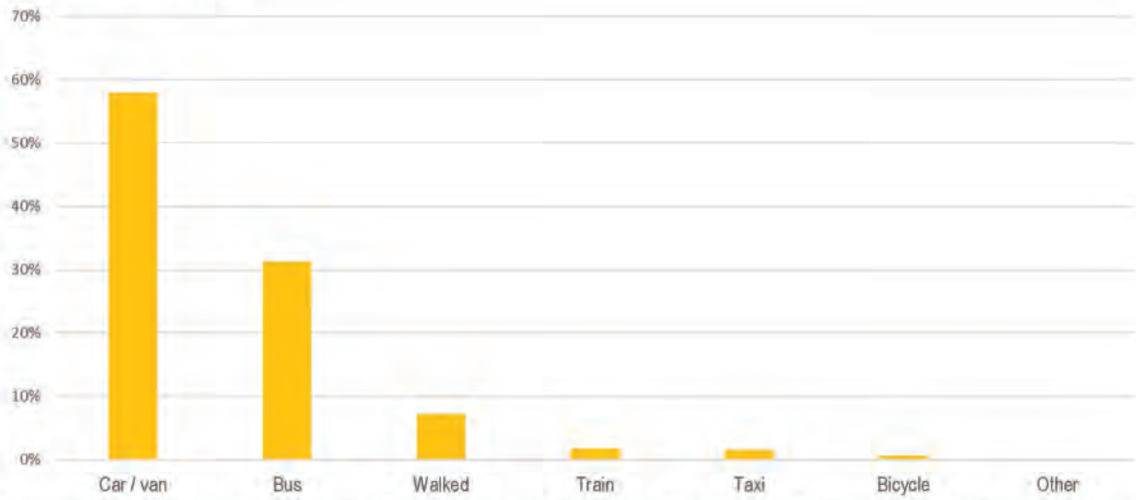
3.2 Main Reason For Visit



Survey respondents are visiting and using the town centre for retail purposes, i.e. general shopping or visiting a particular retailers. Food (convenience and catering) also are important visit drivers. The results in the round would also suggest the town centre is being used as a place to meet, i.e. meeting friends and relatives / high F&B use. Its not currently acting especially as a multi purpose destination. Working, leisure, education and business are all relatively low drivers of visits.

3.0 Consumer Survey

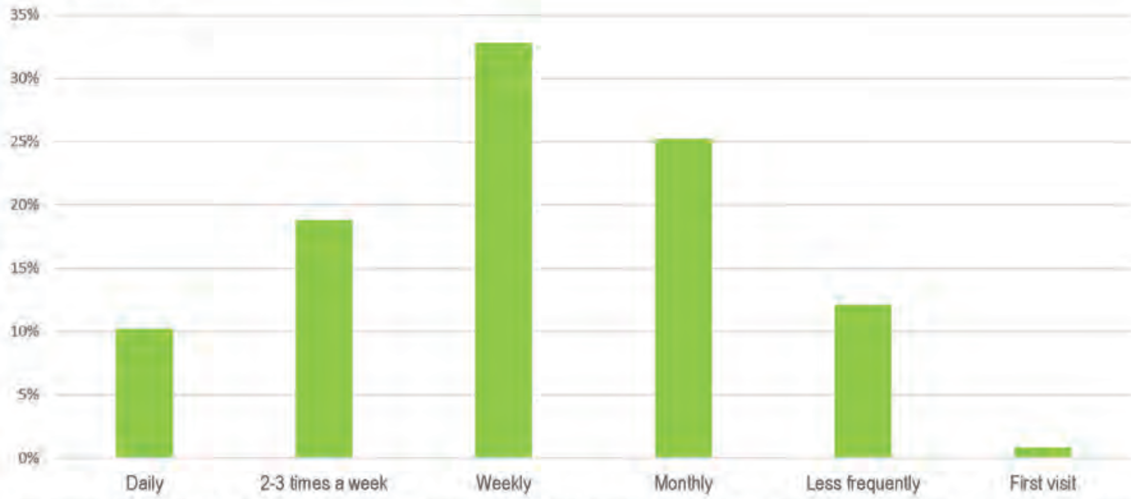
3.3 Main Mode of Transport



Survey respondents are primarily visiting by car and bus. Walking is relatively low, given the high density of population near the town centre. The low use of bicycle reflects the age profile of visitors (a third are over 65)!

3.0 Consumer Survey

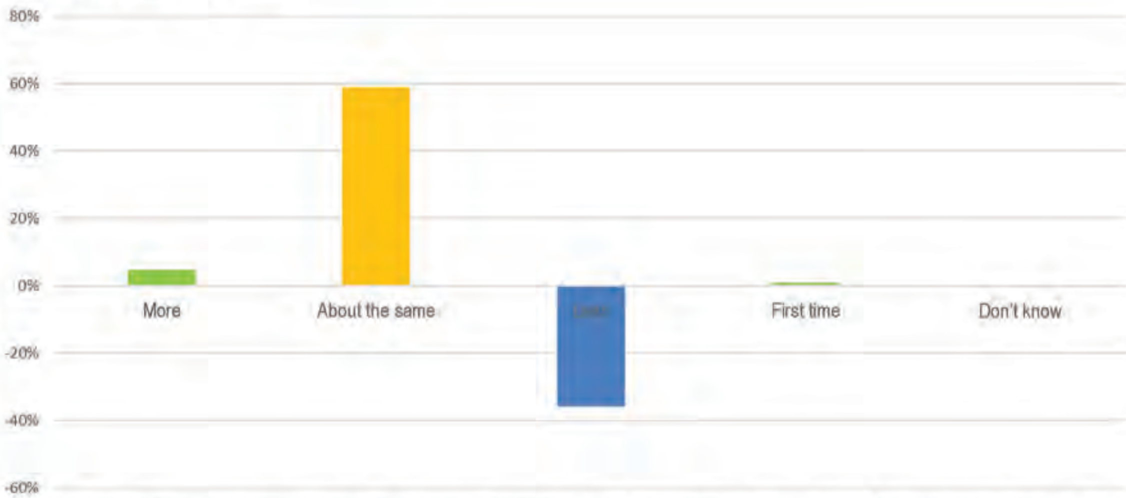
3.4 Frequency of Visit



Survey respondents do visit the town centre on a high frequency pattern. Its quite a split pattern, with just under a third visiting multiple times per week, a third visiting weekly and over a third visiting monthly or less frequently. Few are visiting for the first time.

3.0 Consumer Survey

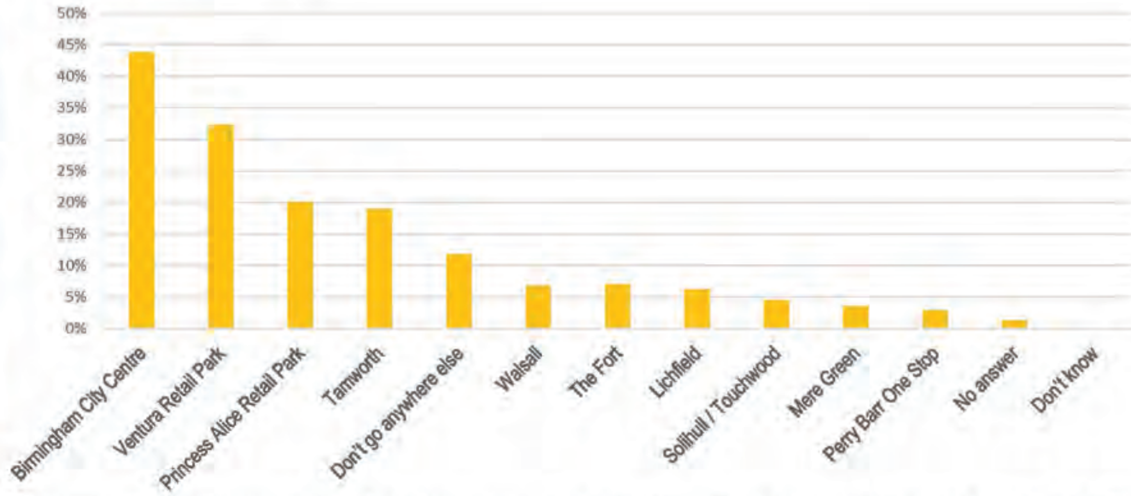
3.5 Changes to Frequency of Visit



On the one hand this question generates a positive response, with nearly two thirds of consumers visiting at the same frequency as last year. On the other hand, a third are visiting less. This is clearly of concern, however is undoubtedly being influenced by the closure of M&S, circa six months ago.

3.0 Consumer Survey

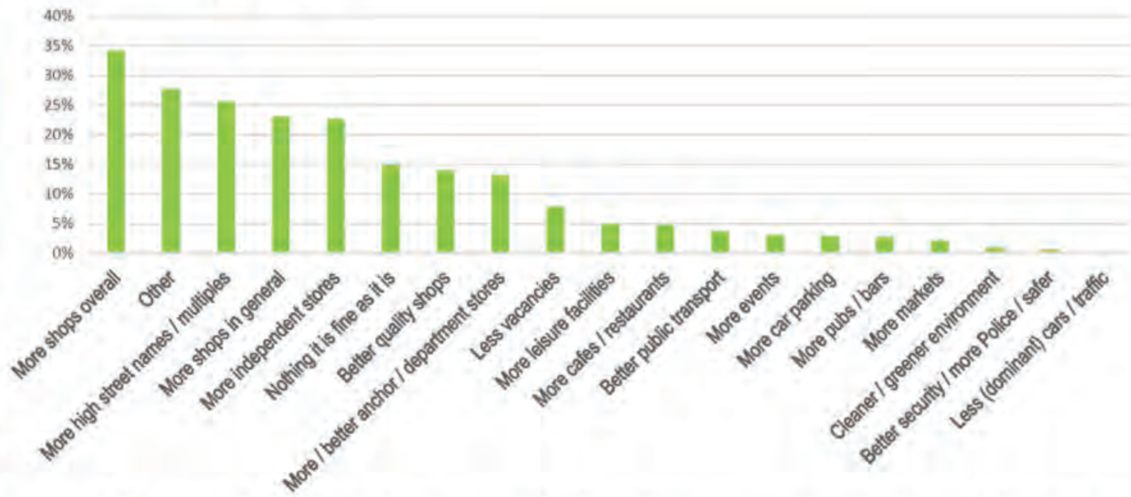
3.6 Other Retail Locations Visited



The responses to this question demonstrate that Suttons consumers are clearly also using a wide variety of alternative centres for their retail needs. This includes the bigger regional centres such as Birmingham City Centre and Solihull / Touchwood but also destination retail parks (Ventura, Princess Alice and The Fort) and other sub-regional centres such as Walsall, Perry Barr and Lichfield at relatively lower levels.

3.0 Consumer Survey

3.7 What Would Encourage More Visits



In keeping with their usage of Solihull as a retail centre, consumers would visit it more if it had more shops, more high street names, better shops, more anchors and more independent stores. They'd also respond to other improvements such as less vacancies, more leisure, more f&b, better public transport and more events / markets. Car parking and dominance of cars did not feature as major improvement areas. In regards to the very numbers of people wanting "other' improvements, these mostly related to (mainly) bring back M&S, more cheaper shops, more older shops and more specialist convenience stores (e.g. butcher, bakers and grocers).

3.0 Consumer Survey

3.8 Summary of Consumer Survey

Sutton Coldfield is attracting consumers to shop there. As such consumers primarily want to see its shopping offer improved.

Visit patterns are of mixed frequency, and declining year on year (as a result of M&S closing).

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

Consumers spread their money around and shop at many other retail destinations in the region.

The profile of shoppers is dominated by females of middle age and above (50+).

4.0 Consumer and Catchment Profile

4.1 Introduction and Methodology

CACI Acorn is a lifestyle classification system that segments households into 6 categories, 18 groups and 62 types according to their postcode (12-15 households).

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

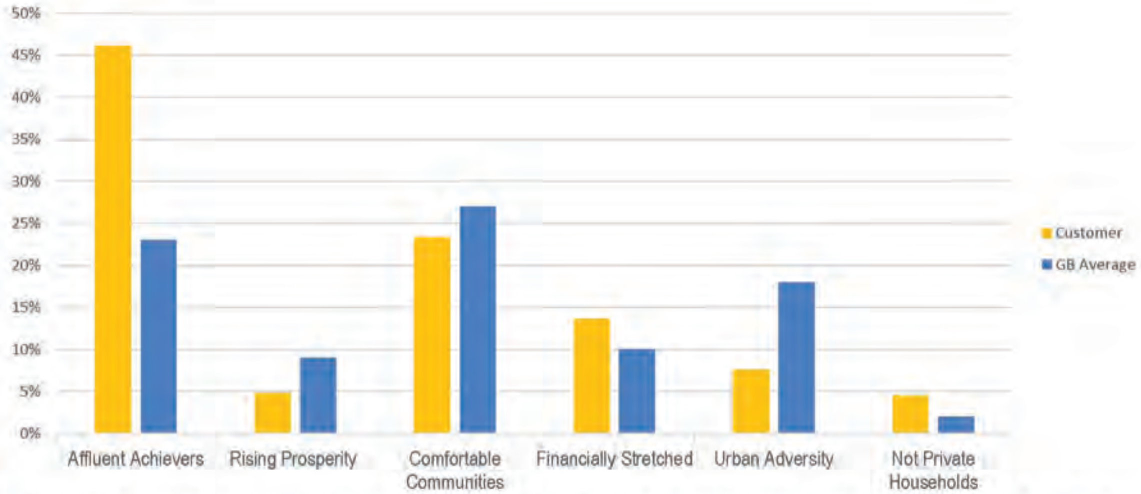
To inform an analysis of the types of people who are visiting Sutton Coldfield, the lifestyle profile of the postcodes of visitors stopped and included in the consumer survey has been sourced from CACI. These have been analysed and compared to the GB national average.

The postcodes of respondents have also been aggregated up to postal sectors (e.g. from B74 5NP to B74 5) and ranked by % origin, to define a core and secondary catchment for the town centre. This identifies where the majority of people who are visiting Sutton Coldfield live.

Finally the Acorn profile of all respondents who live in those primary and secondary catchments has been compared to the profile of consumers actually visiting the town centre. This identifies the lifestyle profile of people living in the area compared to the profile of consumers actually visiting the town centre.

4.0 Consumer and Catchment Profile

4.2 Acorn Profile



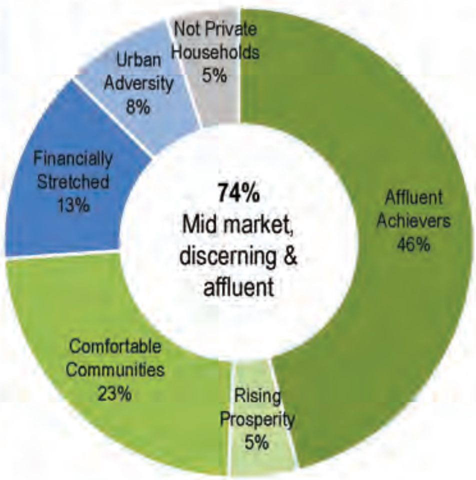
As can be seen the majority of consumers picked up in the consumer survey are classified by CACI as Affluent Achievers, at levels twice the national average. The profile of these consumers is described overleaf. Suffice to say they are amongst the most affluent consumers in the country.

The second dominant group are Comfortable Communities, at similar levels to the UK. Whilst not amongst the most affluent, they do tend to have considerable spending power and are often referred to as Mr and Mrs M&S!

4.0 Consumer and Catchment Profile

4.3 Consumer Lifestyles Profile

As can be seen, 74% of consumers actually in Sutton Coldfield can be described as **mid market, discerning and affluent**



Affluent Achievers – 46%

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

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

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

Over index in the +50 years age groups.

Comfortable Communities – 23%

Comfortably off, **family oriented** households.

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

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

Over index in the +50 years age groups.

4.0 Consumer and Catchment Profile

4.4 Customer Origin

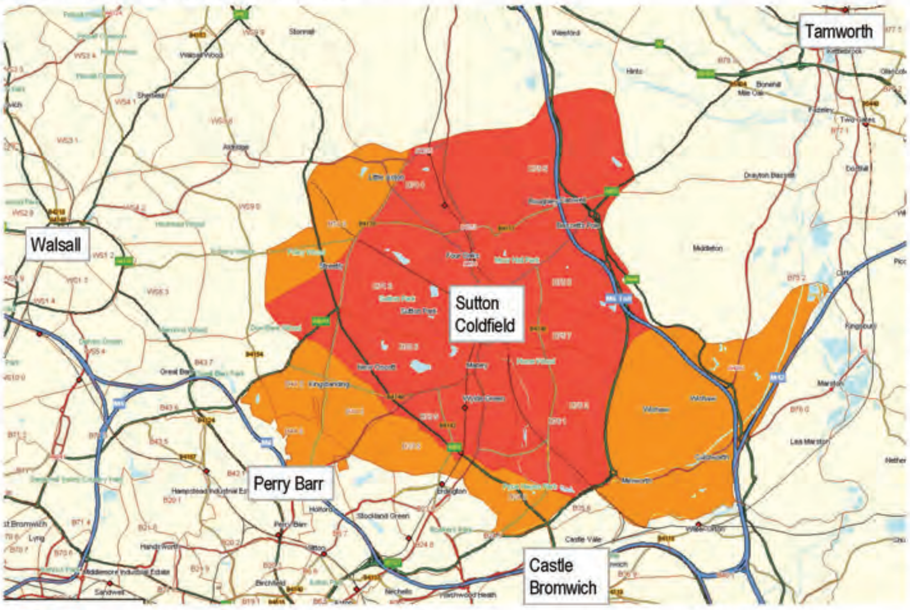
The 527 individual postcodes have been aggregated to postal sectors, and the following table shows where the majority of Sutton Coldfield's consumers originate in terms of their home origins. This is mapped overleaf.

Core Catchment		Secondary Catchment	
B73 6	8%	B74 3	3%
B72 1	8%	B44 0	3%
B73 5	6%	B75 0	3%
B74 2	6%	B24 0	2%
B74 4	6%	B23 5	2%
B75 7	6%	B44 8	2%
B76 1	4%	B44 9	2%
B75 5	3%		17%
B75 6	3%		
B76 2	3%		
	51%		

In addition to the above postcodes, a further 32% of consumers can be classed as inflow consumers, as they originate from beyond these core and secondary areas.

4.0 Consumer and Catchment Profile

4.3 Sutton Coldfield Actual Catchment Area



The core catchment attracts 51% of visits to Sutton Coldfield and includes Sutton Coldfield, Sutton Park, Mere Green, Maney, Four Oaks and New Oscott.

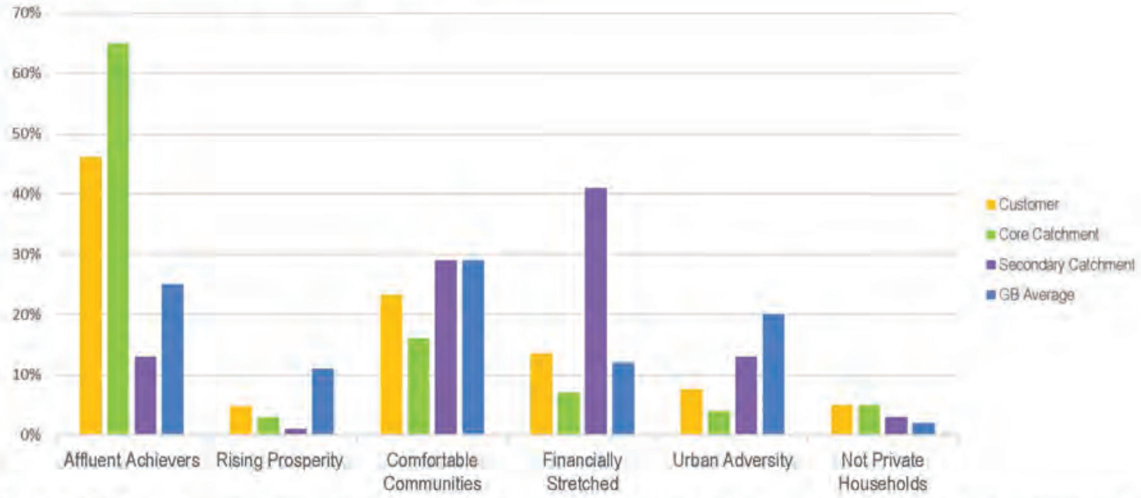
100,000 people live in this core catchment area.

The secondary catchment contains Wishaw, Little Aston, Kingstanding, Old Oscott, Short Heath and Streetly.

80,000 people live in this secondary catchment area.

4.0 Consumer and Catchment Profile

4.2 Comparison of Customer and Catchment Profiles



The Sutton Coldfield customer and core catchment area have similar profiles, and are dominated by affluent, high earning, well educated consumers. If anything, the town centre is slightly under indexing on the most affluent customers, although this could be a result of M&S closing their store in Sutton and opening new stores in Mere Green and Ventura Retail Park in Tamworth.

The secondary catchment has an opposite profile with low levels of affluent customers and high levels of consumers with limited disposable income and / or facing financial hardship.

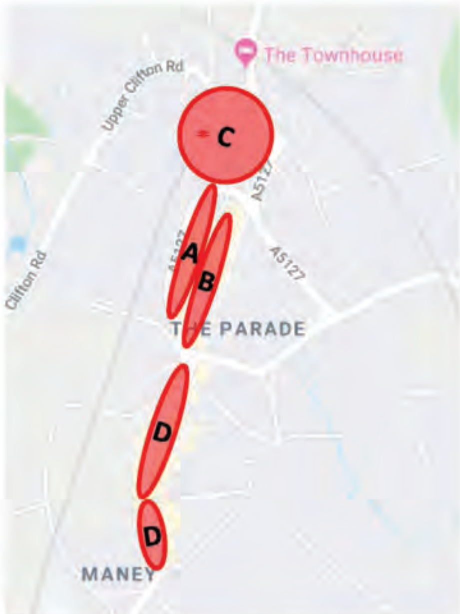
5.0 Retail Review

5.1 Introduction and Methodology

To provide a clear steer as to what needs improving in the town centre, we have visited and assessed the whole extended town centre area, from the perspective of shoppers. For ease of reference we have split the whole offer into four zones.

Aspects we have assessed include ease of shopping, environment, retail mix, target market, facilities, sightlines, routing and parking.

These zones are assessed over the next four pages.



5.0 Retail Review

5.2 A - Gracechurch Shopping Centre

- It has a strong anchor in House of Fraser, however there are questions over its long term future as a business
- Centre has reasonable young fashion offer with store from River Island, New Look and H&M
- Centre looks attractive and well maintained
- Centre has been weakened by several chain failures and shop closures, including M&S, Patisserie Valerie, Flying Tiger and Ann Summers
- Access, permeability and visibility from the rest of the town centre retail offer is limited
- Sense of arrival from the station is poor
- Centre design and environment feels dated, especially open area to the south
- Car park has basic environment and feels dated

5.0 Retail Review

5.3 B - Rest of Core Town Centre, including The Parade

- The Parade is dominate by the large and long term empty ex-Bhs unit. There are also several other long term vacant units
- The wide overhang, excessive concrete and bland streetscape all combine to create a very hard feel to the shopping environment
- Much of the street furniture (e.g. bins, seating) is in poor condition and needs replacing
- There is insufficient public seating
- The core town centre offer is cut off from the rest of the town centre by multiple lanes of very heavy traffic
- The route to the train station feels especially hostile, again not helped by several items of street furniture in very poor and tatty condition
- The northern stretch of The Parade has quite height / level differences, with the route from The Parade down to the buses being quite steep and difficult for those with pushchairs / customers in wheelchairs
- The Red Rose centre presents a poor and very dated consumer experience, especially in the central courtyard in front of the library
- Signage and routing throughout the town centre is poor
- The Park is not visible or well promoted from the town centre

5.0 Retail Review

5.4 C - Birmingham Road

- Excellent cluster of night time eateries, bars and pubs
- Seems to operate separate to the town centre day time offer
- Both offers are physically disconnected from each other
- The Empire Cinema (ex-Odeon) is a local landmark. Its showing its age however both externally and internally. Its also very remote from the town centre
- Good choice of international food styles available, many of them award winners
- Offer seems to trade well. Very busy at weekends
- Family / kids offer is not strong
- This offer is typically not promoted as part of Sutton Coldfield Town Centre

5.0 Retail Review

5.5 D - Historic Town Centre / High Street

- Mill Street and High Street contain many fabulous examples of historic buildings
- The town council offices and college generate additional footfall and potential consumers for the town centre
- Unfortunately the area is blighted by excessive levels of traffic, with queues and standing traffic common during rush hour
- The retail offer in this zone is mostly independent eateries and service providers (financial, personal services and health & beauty)

6.0 Emerging Trends and Benchmark Centres Review

6.1 Introduction

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

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

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

6.0 Emerging Trends and Benchmark Centres Review

6.2 Consumer Trends

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

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

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

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

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

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

6.0 Emerging Trends and Benchmark Centres Review

6.3 Retailer Trends

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

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

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

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

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

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

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

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

6.0 Emerging Trends and Benchmark Centres Review

6.4 What it means for town centres

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

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

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

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

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

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

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

6.0 Emerging Trends and Benchmark Centres Review

6.4 What it means for town centres cont'd.

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

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

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

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

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

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

6.0 Emerging Trends and Benchmark Centres Review

6.5 Summary of Trends

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

6.0 Emerging Trends and Benchmark Centres Review

6.6 Exemplar Centres / Offers and Components

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

Barcode Plymouth

- Purpose built new leisure attraction for city centre core
- Cinema
- Adventure Golf, urban style
- Cocktail bar
- Restaurants
- Former bus station site
- Additional contemporary car parking

The Exchange Aylesbury (Waterside North)

- Latest stage in the long development of the Waterside part of the town
- Council have lead the development in stages, providing Theatre, hotel and Food store
- The exchange now provides 5 F&B units, 47 town centre residential apartments, improved public realm and connectivity to core retail areas

Bromsgrove Health, Beauty & Wellbeing

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

6.0 Emerging Trends and Benchmark Centres Review

6.6 Exemplar Centres / Offers and Components cont'd.

Cathedral Quarter Blackburn

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

Blyth's Meadow Sevenoaks

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

Former Knight and Lea (JLP) Store Southsea

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

6.0 Emerging Trends and Benchmark Centres Review

6.6 Exemplar Centres / Offers and Components cont'd.

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

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

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

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

The importance of wellbeing, health and beauty as key components and attractions should not be under-played.

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

7.0 Conclusions and Growth Opportunities

7.1 Introduction and Methodology

The following section draws together key conclusions arising from the various workstreams undertaken, in order to identify growth opportunities for Sutton Coldfield Town Centre going forward.

7.2 Conclusions

From the research undertaken, we conclude:

Sutton Coldfield Town Centre is currently declining as a centre

The town centre retail offer is experiencing rapid change. Two of the main anchors (Bhs and M&S) have closed in recent times, with only House of Fraser and Aldi remaining. The long term future of both is under threat.

Vacancies are going up and footfall is dropping. Yet the alternative centres in the area (Mere Green and Ventura Retail Park are improving. Consumers are increasingly looking to the internet for their major retail requirements (estimated to be 20% of all spend now online)..

It would appear that the role of Sutton Coldfield is changing from its historic role as a sub regional retail destination for comparison goods, to a more local convenience oriented centre offering minor comparison goods, convenience goods, service and catering.

Sutton Coldfield is attracting a discerning, older customer base

The consumer research undertaken for the project clearly reveals that both the existing visitor as the majority of residents living in the core catchment are particularly discerning and affluent, at levels considerably above the UK average.

These consumers tend to be well educated, well travelled and have high expectations of service and quality. They are classic JLP and M&S shoppers. Sutton Coldfield needs to offer the JLP or M&S experience even if those stores are elsewhere, deliver the same attributes and components.

They tend to be big spenders on their homes, their lifestyles and enjoy the finer food and wine. They are social and like to share meals with their family and friends. They like to cook, and are big users of specialist independents such as butchers, fishmongers, cheese shops and farmers markets.

They are also big users of service facilities, including financial as well as health and beauty operators.

On that basis, the offer in Sutton Coldfield is underwhelming and falling out of sync with the needs and aspirations of these affluent customers.

7.0 Conclusions and Growth Opportunities

7.2 Conclusions

Sutton Coldfield's customers visit lots of other retail centres

Consumers tell us as well as shopping in Sutton Coldfield Town Centre, they also like to shop around at the many alternative centres that surround the town. These include the higher order regional centres of Birmingham City Centre and Solihull (incl. Touchwood), as well as dedicated large shopping parks at Tamworth (Ventura) and The Fort, to improving local centres at Mere Green and Perry Parr, and to a lesser extent 'nice places to visit' such as Lichfield.

This means that Sutton Coldfield's shoppers are being exposed to high standards of retailing and vibrant centres, that are easy to find, (often) easy to park in, have covered areas, extensive catering choice, great facilities such as toilets and seating, strong information provision, easy routing and signage, integrated F&B and leisure offers, active markets and events programs etc

<u>These are all aspects that Sutton Coldfield Town Centre is not currently delivering especially well.</u> As a result, the effort to shop there is reasonably high, yet the reward is low. Furthermore its assets and strengths are being missed.

Its therefore losing ground to the alternative centres in the area as a rewarding, pleasant and vibrant place to shop.

The Sutton Coldfield retail experience is underwhelming

Picking up on the points made opposite, there are several aspects of the shopping experience in Sutton Coldfield that can be improved.

The sense of arrival is poor, by all modes of travel. The condition of car parking is mostly poor, especially above the Red Rose Centre.

There are few memorable or specialist independent stores. The leisure offer is poor, as is the daytime catering offer. The strong evening offer on Birmingham Road is not visible, poorly signed and disconnected from the core town centre offer

There is little in the way of consistent, exciting and appealing branding across the town centre. Cars are very dominant, especially when trying to move from the core town centre offer to the historic town centre core to the north, of the food & beverage cluster to the south. The core town centre is cut off from the surrounding area and nearby components by the multiple lanes of fast moving and often heavy traffic. This includes the famous and appealing Sutton Park.

The pedestrian experience in The Parade is 'hard' and dominated by concrete. There is little in the way of soft aspects such as greening or seating clusters.

The markets offer is popular but not often or visible enough. In all, there are many aspects of the retail experience that need improving.

7.0 Conclusions and Growth Opportunities

7.2 Conclusions

Sutton Coldfield Town Centre is trading on its history and reputation

Most consumers who are visiting the town centre are doing so to shop, including both shopping in general, shopping at a particular retailer or looking for a specific product. Yet as we know, the relative strength of the shopping offer is rapidly diminishing. Indeed it could be argued that the town centre is surviving on the loyalty of its older shopper base.

Its very important going forward that the role, mix and experience of the town centre is updated and reinvented for the younger generation. This means much more energy, more use of social media, more short term popups, more events and more engagement with the many young people who live and study near the town centre.

Town Centre needs more reasons to visit

Further to the points made above, the town centre is attracting a one-dimensional visit pattern, i.e. shopping. As the alternative shopping centres continue to improve, and Sutton Coldfield's relative appeal declines, there is a real danger that usage of the town centre will rapidly diminish.

To prevent this, the town centre needs more reasons for more consumers to be in it, and therefore be potential consumers. This includes more residents, workers, cultural, leisure, education and social vistors.

7.0 Conclusions and Growth Opportunities

7.3 Growth Opportunities

There are many opportunities to improve and grow Sutton Coldfield Town Centre. These include:

1. The town centre has many assets both in the core area and adjacent to it. These are easily missed and need integrating and embracing when promoting the town centre offer. Links to these surrounding assets need improving, especially the park, Birmingham Road offer and High Street / historic town centre area.
2. Develop a strong, consistent and collective brand identity that celebrates Sutton Coldfield as a great place to visit, and its many assets e.g. park, food & beverage offer, 'royal' connections.
3. Target a stronger daytime eating offer, covering full age spectrum.
4. The town centre would benefit from more potential customers in it, i.e. live, work, play, leisure, meet, social and cultural.
5. Develop a prospectus to sell the opportunity to other independent retailers. Target successful operators in other discerning West Midlands' suburbs, especially a grocer / deli, butcher, cheesemonger, fishmonger, artisan baker etc.
6. Target mid market retailers that open in clusters in mid market suburban centres, e.g. Joules, White Stuff, Fat Face, Mint Tulip, Neal's Yard, Cote, JoJo Maman Bebe, The Ivy, Black Sheep Coffee, Cook. Prepare specific prospectus targeting these and similar mid market retailers.
7. Target farm shops, garden shops, home lifestyle shops, trader collectives.
8. Assess options for providing a more regular market provision, i.e. at least weekly.
9. New 'wisdom' club. Like a youth club, but for more mature people, e.g. classes, clubs, talks & presentations, access to information & support, lending library, café, keepfit etc.
10. Invite expressions of interest from specialist event operators to hold more regular town centre wide events, e.g. Julie's Vintage Fashion Market / Hemmingway's Weekend Collectable Fairs. See Perth, Portsmouth and York Annual Events Programs.
11. The town centre needs a new multi asset arts centre, e.g. cinema / performance space / gallery / café / bar. The Red Rose Centre would be an ideal location for this.

7.0 Conclusions and Growth Opportunities

7.3 Growth Opportunities cont'd.

12. The town centre needs much better routing / a new signage package, covering all main arrival points but also across the centre, cross promoting all major asset.
13. Improve the retail environment, improve sightlines, upgrade street furniture, remove canopies or investigate options to glaze them.
14. Assess opportunities to provide more 'pocket parks' and green linkages.
15. The town centre needs much closer linkages to surrounding community groups and ideally host more meetings, activities, events and celebrations.
16. Not so much of an opportunity but more of a requirement; the town centre needs a strong convenience offer to maintain frequent visit pattern for regular consumers. If Aldi relocates and is not replaced this will be very detrimental to the town centre's appeal.
17. The town has many empty units (some large) which could be used for meanwhile / temporary uses, i.e. short term lets and popups (food, services, cultural, enterprise and information).

A3 Consumer survey example

THE RETAIL GROUP

Sutton Coldfield Consumer Survey

informed solutions

Introduction: We are carrying out a survey on behalf of Sutton Coldfield Town Centre Regeneration Partnership about shopping patterns in Sutton Coldfield Town Centre and would like to ask you some very quick questions.

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

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

Write in:

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

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

Write in

Q3 How often do you visit this centre?

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

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

- ☐ More
- ☐ About the same
- ☐ Less
- ☐ First time
- ☐ Don't know

Q5 Which other retail centres do you use or visit on a regular basis? **Multiple unprompted, up to 3**

- ☐ Ventura Retail Park
- ☐ Tamworth
- ☐ Walsall
- ☐ Birmingham City Centre
- ☐ Princess Alice Retail Park
- ☐ Don't go anywhere else
- ☐ Don't know
- ☐ No answer
- ☐ Other

Write in

Q6 What would encourage you to visit Sutton Coldfield Town Centre more often?
Multiple unprompted, up to 3

- [ ] More shops overall
- [ ] More high street names / multiples
- [ ] More shops in general
- [ ] More / better anchor / department stores
- [ ] More independent stores
- [ ] More cafes / restaurants
- [ ] Better quality shops
- [ ] More pubs / bars
- [ ] Better public transport
- [ ] More leisure facilities
- [ ] More car parking
- [ ] Less (dominant) cars / traffic
- [ ] Better security / more Police / safer
- [ ] Less vacancies
- [ ] Cleaner / greener environment
- [ ] More events
- [ ] More markets
- [ ] Nothing it is fine as it is
- [ ] Other

Write in

Q7 Finally, so that we know where people come from generally, what is your full home postcode?

Q8 Gender

- [ ] Male
- [ ] Female

Q9 Age

- [ ] 18 – 25
- [ ] 26 - 44
- [ ] 45 - 64
- [ ] 65+

Q10 Day

- [ ] Weekday
- [ ] Weekend

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

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

Interviewer declaration:

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

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

Signature _ _ _ _ _ _ _ _ _ _

Date _ _ _ _ _ _ _ _ _ _

A4 Market research report (SQW)

Sutton Coldfield
Market Research Report

Baseline study to support the Town Centre Masterplan

January 2020

SQW

Contents

Contact:	Sophie Robinson	email:	srobinson@sqw.co.uk
Approved by:	Andy Smith Director	Date:	15/01/2020

SQW

www.sqw.co.uk

EXECUTIVE SUMMARY

Market research report provides an insight to the dynamics of Sutton Coldfield's real estate market to support to inform the master-planning process.

SQW investigated four key sectors; residential, office, retail and commercial leisure. The key findings and opportunities found in this report are illustrated below.

DEMOGRAPHY 2011-2018

0.01%

0.7%

Total population declined by 0.01%, driven by a decline in working aged population.

2.2%

Sutton Trinity Ward (town centre) experienced the largest increase in older generation population.

TOP HEADLINES

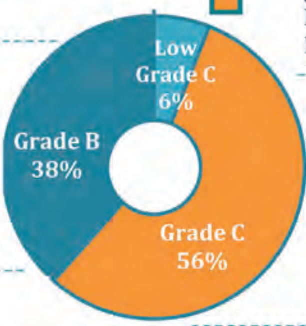
Over 5-years the price growth of flats remained unchanged at **0.0%**

100% of office stock is **Grade B or lower.**

Rental Value **£13 per sq. ft**

Vacancy Rates **1.3%**

Limited stock greater than 2,000 sq. ft



Current hotel provision: **1**

Main food and beverage offering is along the heavily congested Birmingham Road

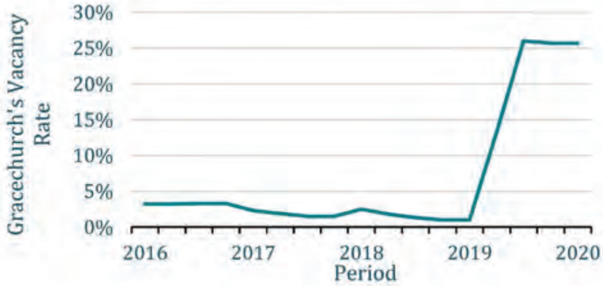
Retail stock is **30% over-supply**

Vacancy rates;

Gracechurch: **25.7%**

Sutton Coldfield: **12.7%**

Other retail parks are proving more attractive to shoppers and occupiers.



OPPORTUNITIES

Rise in demand for **town centre living**, particularly from older generations.

Review the progress of Knight's house and Langley SUE to evaluate future demand

Provide **modern, good quality, flexible** workspace that supports local businesses as they grow.

Office development should be brought forward with other development uses to safeguard viability as rental values are low

Improve leisure and culture offering in town centre and concentrate facilities to create a destination

Relocate cinema closer to the town centre to increase footfall

Increase hotel provision to accommodate visitors and business trips, benefitting from connectivity to Birmingham city centre

Create a **safer environment** and **better public realm** along Birmingham Road to improve footfall and a better experience for customers / diners

Reduce retail supply to meet local requirements. Create a **local, sustainable, and diverse** retail and leisure offering.

SQW

1

1. Introduction

1.1 SQW Land and Property are part of a consortium, led by Tibbalds commissioned to deliver a masterplan for the regeneration of Sutton Coldfield town centre. SQW Land and Property's role is to provide market and viability support to inform the master-planning process and as part of this to prepare a baseline property market report. The research investigates the current provision of Sutton Coldfield's residential, office, retail and leisure markets and how demand in each sector is expected to perform in the long-term.

1.2 The structure of the rest of the report is as follows;

- Demographic Profile
- Residential Sector
- Retail Sector
- Hotel & Leisure Sector
- Office Sector

2. Demography

2.1 Sutton Coldfield, officially the Royal Town of Sutton Coldfield is a large town and civil parish located 7 miles north east of Birmingham City Centre. Sutton Coldfield is one of Birmingham's ten parliamentary constituencies. Located within the local authority district of Birmingham, Sutton Coldfield, comprises eight electoral wards as of May 2018. These include Sutton Mere Green, Sutton Reddicap, Sutton Roughley, Sutton Trinity, Sutton Vesey, Sutton Walmley and Sutton Minworth, and Sutton Wylde Green. Sutton Coldfield Town Centre is located within Sutton Trinity Ward.

Figure 1. Sutton Coldfield Location Map

2.2 In 2018, Sutton Coldfield had a total estimated population of 94,395; of which 55,633 were of working age (aged 16-64). The working age population in Sutton Coldfield accounted for

58.9% of total population; this was lower than that seen across all comparators and 3.7% lower than the national average.

Table 2-1: 2018 population estimates

	Total	Aged 16-64	Percentage of total population
Sutton Trinity (town centre)	9,257	5,425	58.6%
Sutton Coldfield	94,395	55,633	58.9%
Birmingham	1,141,374	733,615	64.3%
West Midlands	5,900,757	3,651,170	61.9%
England	55,977,178	35,049,467	62.6%

Source: ONS population estimates

2.3 Seven-year annual growth rates show that, in Sutton Coldfield, the total population declined by 0.07% between 2011 and 2018. However, the population of Sutton Trinity Ward increased by 0.5%; this was higher than that seen across all other wards. In Birmingham, West Midlands and England, the total population increased by 0.87%, 0.73% and 0.75%, respectively. However, the working population declined from across all wards; Sutton Trinity population declined by 0.4%. Moreover, the population of people aged 65 and over in Sutton Trinity increased by 2.2%; the second largest growth rate, behind Sutton Walmley and Minworth (2.7%). All wards have experienced retirement-aged population growth from 2011-2018.

Table 2-2: Population growth rates from 2011-2018

Area	Total	Aged 0-15	Aged 16-64	Aged 65 and over
Sutton Four Oaks	0.3%	0.8%	-0.2%	0.1%
Sutton Mere Green	0.3%	1.7%	-0.4%	0.7%
Sutton Reddicap	-0.2%	-0.2%	-0.6%	1.0%
Sutton Roughley	-0.04%	0.0%	-0.4%	1.1%
Sutton Trinity (town centre)	**0.5%**	**2.0%**	**-0.5%**	**2.2%**
Sutton Vesey	0.0%	0.0%	-0.4%	1.2%
Sutton Walmley & Minworth	-0.4%	-1.1%	-1.2%	2.7%
Sutton Wylde Green	-0.8%	-0.9%	-1.8%	2.1%
Sutton Coldfield	**-0.01%**	**0.2%**	**-0.7%**	**1.5%**
Birmingham	**0.9%**	**0.8%**	**0.9%**	**0.9%**
West Midlands	**0.7%**	**0.8%**	**0.4%**	**1.9%**
England	**0.8%**	**1.0%**	**0.3%**	**2.2%**

Qualifications

2.4 In 2018, qualification levels in Sutton Coldfield were high relative to that of the wider three comparator areas; Birmingham, West Midlands and England. In 2018, 29.3% of the population aged over 18 and economically active had Level 4 qualifications or above. This was higher than all other areas considered including the national average (21.2%)

Table 2-3: Highest level of qualification for all residents aged 18 and over

	Aged 18-24 and in full-time education	Aged 18-64, economically active with Level 3 qualifications or higher	Aged 18-64, economically active with Level 4 qualifications or higher
Sutton Coldfield	1.7%	39.4%	29.3%
Birmingham	5.9%	25.8%	16.8%
West Midlands	3.0%	27.3%	17.4%
England	2.7%	31.1%	21.2%

Source: Annual Survey of Hours and Earnings 2018

Earnings

2.5 Data suggests that resident earnings in Sutton Coldfield are high in comparison to Birmingham, West Midlands and England. In 2018, among full-time employees, median gross weekly resident earnings in Sutton Coldfield were £779. This suggests that household income was considerably higher than all comparator areas.

Table 2-4: Median gross weekly earnings for full time employees 2018

	Weekly earnings (£)
Sutton Coldfield	779
Birmingham	623
West Midlands	644
England	696

Source: Source: Annual Survey of Hours and Earnings 2018

Summary

2.6 Data suggests that the Sutton Coldfield has seen a small decline in the total population between 2011 and 2018. The working age population has seen largest decline, with the other age groups; 0-15 and over 65 all experiencing an increase in population. Whilst, the working age population in Sutton Trinity also declined, the total population increased more than any other ward in Sutton Coldfield. Thus, highlighting that a strong population growth, particularly in groups aged 0-15 and over 65. Additionally, data suggests that resident's earnings are high in Sutton Coldfield when compared to comparator areas. This may be influenced by the greater proportion of the population that hold Level 4 or above qualifications.

2.7

3. Residential Market

3.1 This section of the report will provide an overview of the UK's and Birmingham's residential property market before analysing Sutton Coldfield's residential market performance. Furthermore, we liaised with the following local estate agents; Green & Company Estate Agency, Martin & Co Lettings and Estate Agency, and Connells Estate Agents to validate our desk-based research findings and obtain their opinion of the long-term demand for residential units in Sutton Coldfield Town Centre.

3.2 The national average house price grew 0.7% over the year preceding October 2019 to £232,944 (UK House Price Index October 2019, ONS). This was the lowest growth since September 2012 driven by a reduction house prices in London (-1.6%) and the North East of England (-1.1%). In England, flats and maisonettes have experienced the largest fall in price (-3.7%), whilst other property types such as detached, semi-detached and terraced houses have achieved an average growth in price of 1.1%, 2.2%, and 1.1%, respectively (England House Price Index October 2019, ONS).

3.3 Birmingham's house price increased by 3.5% year-on-year, the growth rate has outperformed the wider UK market, with prices rising faster than anywhere else in the UK, including London (CBRE, 2019, Zoopla House Price Index, 2019). Knight Frank attributed Birmingham's strong house price growth to increasing investment potential and confidence amongst buyers. Improvements in infrastructure and connectivity including the extension of the Metro, the planned High Speed 2 (HS2) link and 5G mobile pilot scheme continue to make the city a popular investment hotspot to expand portfolios and generate strong rental yields. Despite the growth of house prices, Birmingham's average property price (£167,000) remains significantly lower than the UK average (Knight Frank Birmingham and Surrounds Residential Market Insight, 2018). Birmingham is expected to remain one of the best places in the UK to invest in, with prime residential values forecasted to reach £500 per square foot by 2020 (Birmingham Investment Guide, 2019).

3.4 In January 2020, Zoopla reported that Sutton Coldfield's average property price is £362,000; a year-on-year change of –2.08%. During the same period, the average price for a flat stood at £188,447. The heat map (Figure 2) below, illustrates that Sutton Coldfield's average house prices are similar to that in Solihull, yet more expensive in comparison to surrounding areas in Greater Birmingham.

3.5 According to ONS, in June 2019, the average price paid for a second-hand flat within the town centre (Sutton Trinity Ward) was £132,575. However, this data does not differentiate house prices by number of bedrooms or property size. Furthermore, there was no data available for newly built stock within Sutton Trinity Ward, highlighting the lack of new development within the town centre. Subsequently, the average five-year annual growth rate of second-hand flats within Sutton Trinity have remained unchanged at 0.0%.

Figure 2. Heatmap of house prices in Sutton Coldfield and the surrounding area.

Source: Mouseprice (2019)

3.6 Figure 2, illustrates the volume of residential sales per annum by type in Sutton Coldfield. This demonstrates that from 2016 to 2018 due to a declining number of detached housing sales and a small increase in the number of apartments being transacted, flats have overtaken detached house sales by volume. Throughout this period the least number of properties sold were terraced houses.

Figure 3. The volume of residential sales from 2016 -2018 by type of property in Sutton Coldfield.

Source: Zoopla

3.7 The findings of our desk-based research are presented in Table 1 below. Local estate agents confirmed that the sale prices below are consistent with the current open market value of flats.

Table 3-1: Town Centre Residential Sale Prices

Number of bedrooms	Price range (£)
1Bed	£120,000 - £150,000
2Bed (<1,000 sq. ft.)	£160,000 - £200,000
2Bed (>1,000 sq. ft.)	£230,000 - £300,000
3Bed (>1,000 sq. ft.)	£285,000 - £320,000
4Bed (>1,200 sq. ft.)	£320,000 - £360,000

3.8 The discussions with estate agents suggested that the residential market has been performing very well in previous years which can be attributed to several reasons. Firstly, people view Sutton Coldfield as an attractive place to live with modest house prices in relation to other parts of the country. Whilst property prices in Sutton are higher in comparison to other areas in Birmingham, people who are relocating here believe they are getting good value for money, especially in big family homes. There is a very strong first-time buyer market, additionally numerous young professionals are moving to Sutton Coldfield because of its excellent links to Birmingham City Centre. Agents explained that the relocation of HSBC and other firms to Birmingham has influenced demand for residential property in Sutton Coldfield.

3.9 International companies such as PwC, Barclays, ACS, HSBC and RBS have all relocated parts of their operation to Birmingham in recent years. If Birmingham continues to attract large firms and investment, this may influence the number of people choosing to live to Sutton Coldfield. However, a 4.1% decline of Sutton Coldfield's working population from the period 2011- 2018 suggests that the relocation of large firms is not impacting Sutton Coldfield's working population. It is worth nothing that an agent expressed a slight concern that this year the market has slowed down, he believed that this was associated with short-term political uncertainty the UK is currently facing.

3.10 Like the rest of the UK, Sutton Coldfield has a growing aging population. In 2018, Sutton Coldfield had the largest proportion of the population aged over 65years at 23%, in comparison to Birmingham, and West Midlands, 13% and 18%, respectively. Several agents commented on the demand from older generations looking to downsize and remain close to amenities in Sutton Coldfield. New developments such as Tudor Place, have taken the opportunity to develop large luxury apartments near the town centre to cater for this demand.

Tudor Place Case Study

3.11 Tudor Place is located close to Sutton Park, north-west of Sutton Coldfield train station. This gated development comprises of eight, luxury 2 and 3-bedroom apartments, with parking. The size of the apartments ranges from 1009 sq. ft. to 1263 sq. ft., which is significantly larger than the typical size of new builds (approximately 650 sq. ft).

Figure 4. Tudor Place Location Map (red marker)

3.12 The current asking prices are as follows:

Table 3-2: Tudor Place asking prices

Unit Size	Minimum Sales Value	Maximum Sales Value
2Bed	£399,000	£475,000
3Bed	£525,000	£525,000

3.13 The asking prices of properties on Tudor Place are considerably higher than the price of second-hand flats within Sutton Coldfield. Thus, suggesting the quality and size of apartments has resulted in a price premium.

Caversham Place Case Study

3.14 Caversham Place is a gated development built in 2003, located off Birmingham Road positioned within the heart of Sutton Coldfield's Town Centre. The development consists of 149 purpose-built one, two, three, and four-bedroom flats.

Figure 5. Caversham Place Location Map (road highlighted red)

Source: Google Maps

3.15 Properties in Caversham Place have achieved the following sales price per unit type;

Table 3-3: Caversham achieved sales prices from 2017 - 2019

Unit Size	Minimum Sales Value	Maximum Sales Value
1Bed	£120,000	£140,000
2Bed	£150,000	£220,000
3Bed	£240,000	£300,000

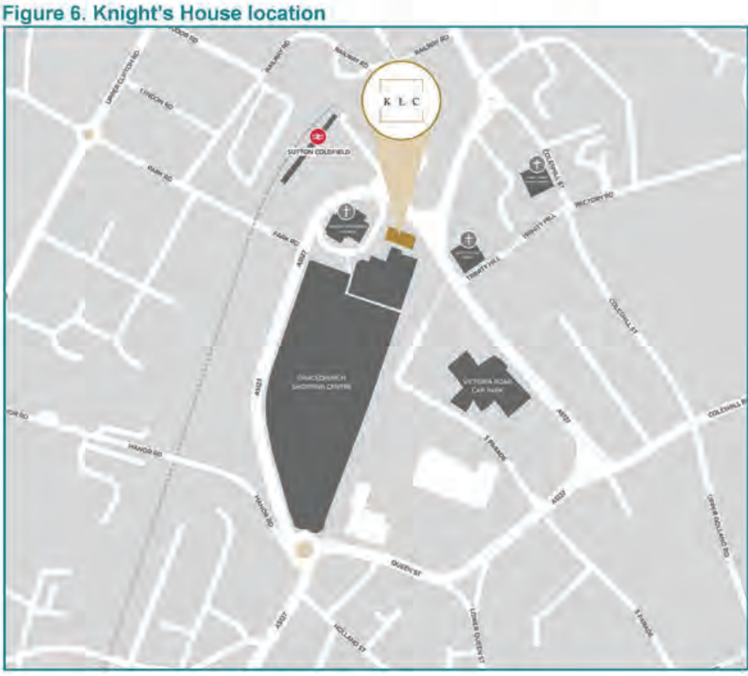
Source: Zoopla and Rightmove

Knight's House Case Study

3.16 Centric and Key Land Capitals are bringing a former office block forward through permitted development rights to convert Knight's House from B1(a) to C3 residential apartments. Knight's House is located north of the Gracechurch Shopping Centre is currently under development. It will comprise of 63, 1 and 2-bedroom apartments. The development is due to be completed in 2021 (Figure 6). The developers are holding some units for rental, Centric informed us that the rental value of a one-bedroom property is £615 per calendar month (pcm). The size of a one-bedroom apartment ranges from 334 sq. ft to 474 sq. ft. Moreover, a two-bedrooom apartment ranging from 538-591sq. ft is priced at £815-£900pcm. The larger penthouse apartments on the top two floors range from 667-710 sq. ft and are priced at c.£1025pcm. All of the larger rental apartments have secured a let.

3.17 Asking prices for the properties for sale have not yet been released. Desk based research on Knight's House suggest that the asking price of a one-bedroom property will be in the region of £165,000 and in the region of £215,000-£225,000 for a two-bedroom apartment. These figures are subject to confirmation.

Figure 6. Knight's House location

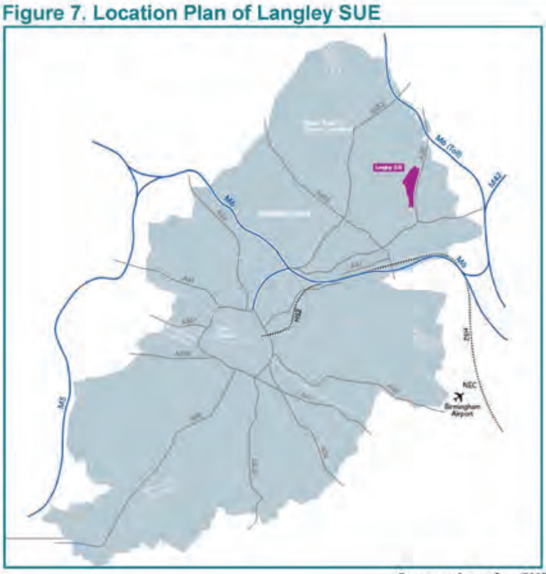


Source: Key Land Capital Plc

Langley Sustainable Urban Extension

3.18 Langley Sustainable Urban Extension (Langley SUE) will be a new large scale residential sustainable development located in Sutton Coldfield. The opportunity site sits adjacent to an established residential area in Sutton Walmley & Minworth ward. Langley SUE is allocated in the Birmingham Development Plan and consequently 244ha of land will be released from the Green Belt to accommodate the delivery of 6,000 homes and supporting infrastructure over a 20-year period.

Figure 7. Location Plan of Langley SUE



Source: Langley SUP

3.19 The design of Langley SUE will be focussed around delivering a high quality, creative and sustainable urban community. The key principles of Langley SUE are high quality design, not only in buildings, which will be flexible and resilient to climate change but across all aspects of design. Most of Langley SUE is expected to be medium density; 35-40 dwellings per hectare. The highest level of density will be in around the community hubs where apartments will be located above retail shops.

3.20 Whilst the mix of housing has not yet been defined, the development aims to deliver a mix of family, affordable, starter homes, and homes for the elderly. It is, therefore, difficult at this stage to quantify how the Langley SUE will affect house prices and demand in Sutton Coldfield's town centre. Nevertheless, due to the scale of this development, the progress and development of the scheme should be considered, and pricing at Langley will undoubtedly influence town centre values due to the attractive alternative homes that will become available over an extended period.

Summary

3.21 Sutton Coldfield's residential prices are strong in comparison to other areas in Birmingham. The development of Knights House and growing population of Sutton Trinity suggests that there is a demand for town centre living. Furthermore, the delivery of Tudor Place, reinforces the demand for town centre living from older generations who wish to be located closer to amenities.

3.22 Further investigation is necessary as Langley SUE progresses to truly understand the effect this large residential development may have on the demand for town centre residential living.

4. Retail Market

Birmingham City Retail Market

4.1 CoStar and regional market reports consider Sutton Coldfield within Birmingham City's retail submarket - the largest submarket in Greater Birmingham. Birmingham City submarket encompasses central Birmingham and stretches north to Sutton Coldfield and south to Longbridge. With nearly 30 million square foot of retail space, this submarket comprises of just below 50% of the total retail space within Greater Birmingham (CoStar, 2019). Despite the recent struggle UK retail is facing, Birmingham's retail market has remained strong with vacancy rates lower than the UK average (Carter Jonas, 2019).

Figure 8. Birmingham City Submarket Boundary Map

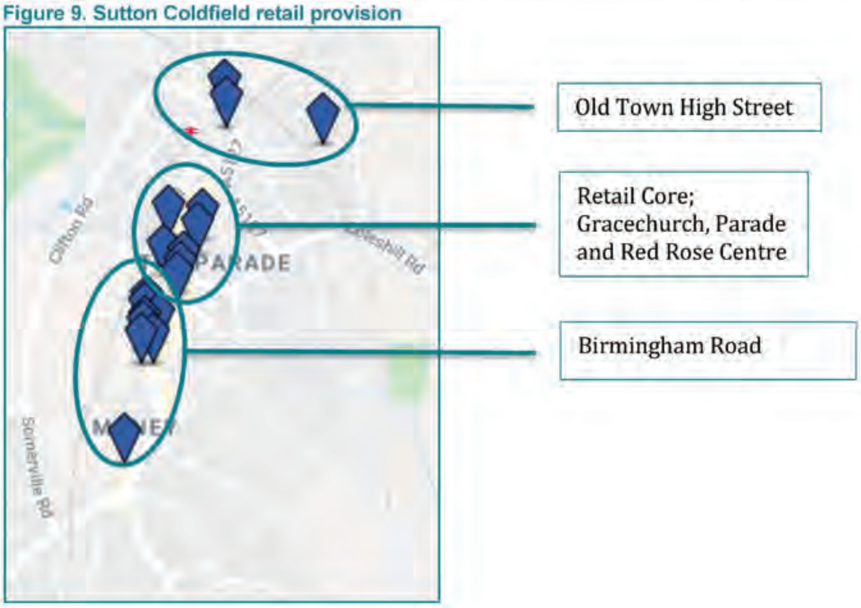
Source: CoStar

4.2 Birmingham is becoming a national retail destination with the likes of the Bull Ring, Grand Central, the Paradise and the regeneration of New Street Station. Birmingham city centre is attracting high-end luxury brands, flagship brands, and High Street multiples alike. Furthermore, the West Midlands county's population expected to grow 5% in the next decade (CoStar). The additional footfall of people to the area begs the question if Sutton Coldfield's retail offer should seek to provide additional support to Birmingham's growing population or cater for the local demand.

Sutton Coldfield Retail Market

4.3 The retail amenities in Sutton Coldfield's town centre are predominately located south of the civic centre, along the Parade and Birmingham Road. The retail core includes three main areas; The Parade, Gracechurch and the Red Cross Centre. The retail core of the town centre hosts a variety of High Street tenants such as New Look, JD Sports, Ryman Stationery, Office, FatFace and River Island. The largest anchor store is House of Fraser. Independent shops tend to be located along Birmingham Road along with several high-street banks, charity shops, and provides the principal area for Sutton Coldfield's food and beverage offering. There is limited retail within the historic old town / High Street as this area of Sutton Coldfield is primarily serves professional businesses and education facilities. All High Street retail lease transactions identified by CoStar are as A2 shops primarily used for professional services, such as Estate Agents.

Figure 9. Sutton Coldfield retail provision

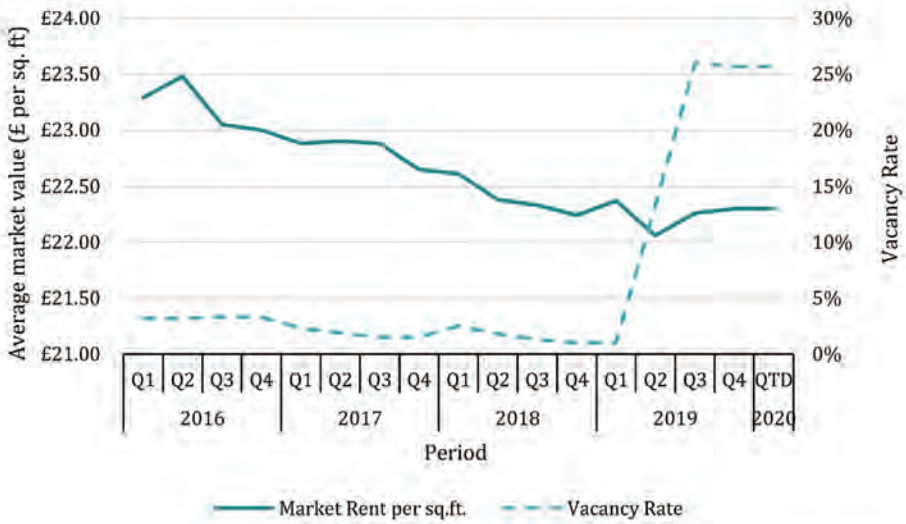


Source: CoStar

4.4 M&G Investments (M&G) acquired the Gracechurch Shopping Centre in 2013, which comprises of c.550,000 sq. ft of retail space across 91 units, is the town's principal retail offering accounting for 80% of spend in Sutton Coldfield (M&G Real Estate & Savills). The town centre is thought to have a shopper population drawn from a wider catchment, of 529,000 people, however, from 2015 to 2019, consumer footfall has reduced by 10% (M&G Real Estate).

4.5 Over the past year, the recent downturn in retail has negatively affected the Gracechurch Shopping Centre's performance. In 2016, BHS departed from Gracechurch; the unit has remained vacant since, and other brands that have relocated include; The Body Shop, Starbucks, Tiger, Patisserie Valerie and Marks and Spenser. In January 2020, Argos is due to leave, and Carphone Warehouse has exercised a break clause. Our data from CoStar, estimate a 25.7% vacancy rate within the Gracechurch, a 24.7% increase in comparison to last year (Figure 10). The loss of Marks and Spenser and other key attractors is said to have reduced consumer confidence and footfall to Sutton Coldfield's retail offering. Additionally, the large number of shop closures has deterred potential tenants from occupying available retail units.

Figure 10. Gracechurch Shopping Centre, average market rent and vacancy rate from 2016-Present

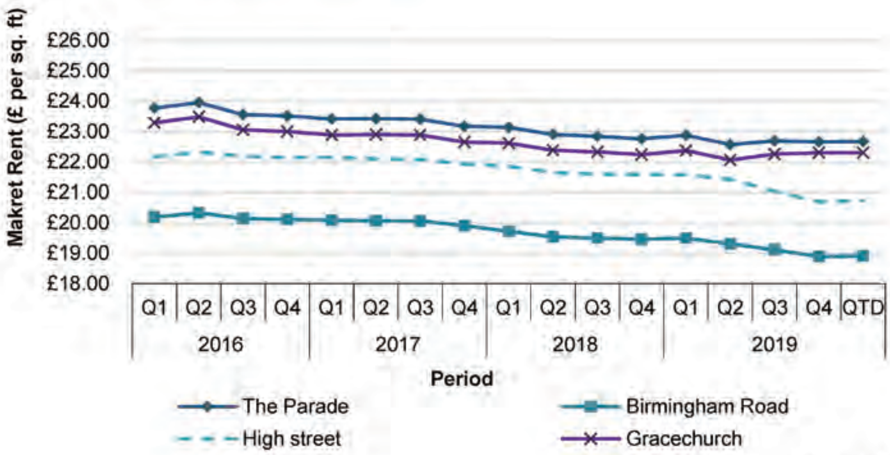


Source: CoStar

4.6 SQW has analysed how the retail market has performed over time (2015 – January 2020) by utilising data from CoStar. The leasing activity from 2016 – Q4 2019 in the four core areas; Old town High Street, The Parade (included The Red Rose Centre), Gracechurch, and Birmingham Road is in Annex A.

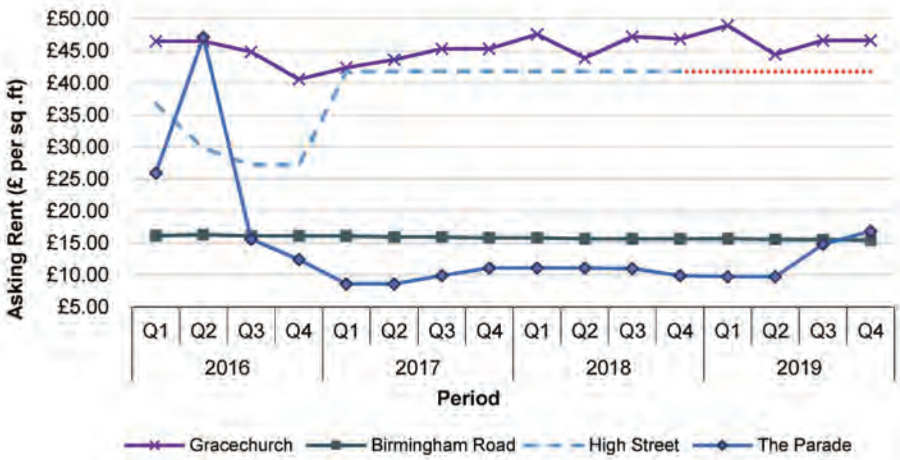
4.7 Figure 11, demonstrates that from 2016 the market rent per sq. ft has been slowly declining in all retail areas. While relatively similar, the Parade's market rents have been consistently higher than the Gracechurch's market rents. However, the asking price within the Gracechurch is 50% greater than the market rent (Figure 12). Additionally, a review of the lease transactions indicates that the maximum rental value achieved was occupied by Krispy Kreme for £72 per sq. ft, for a 250 sq. ft. unit in 2017. CoStar does not have transactional lease data on the Gracechurch from 2018 onwards, highlighting a lack of take-up within the shopping centre during recent years. However, this is consistent across all retail areas in Sutton Coldfield, as CoStar identified four transactions that took place in 2019. As expected, the retail core centre around the Parade and Gracechurch commands higher rent per annum in comparison to Birmingham Road and the old town High Street.

Figure 11. Market rent per retail area



Source: CoStar

Figure 12. Asking Rent per retail area



Source: CoStar. Please note, the red dashed line indicates that there was no data available on High Street asking prices from Q4 2018 onwards.

4.8 Outside the Gracechurch Centre, the highest rents range from £24-£27 per sq. ft with Birmingham Road achieving an average rental value of £18 per sq. ft (see Table A.4, Annex A). The High Street of the Old Town has a restricted supply of retail units, and we were able to identify one lease transaction that has completed over the past three years at £26 per sq. ft. - here the limited supply of available space has kept rents relatively competitive.

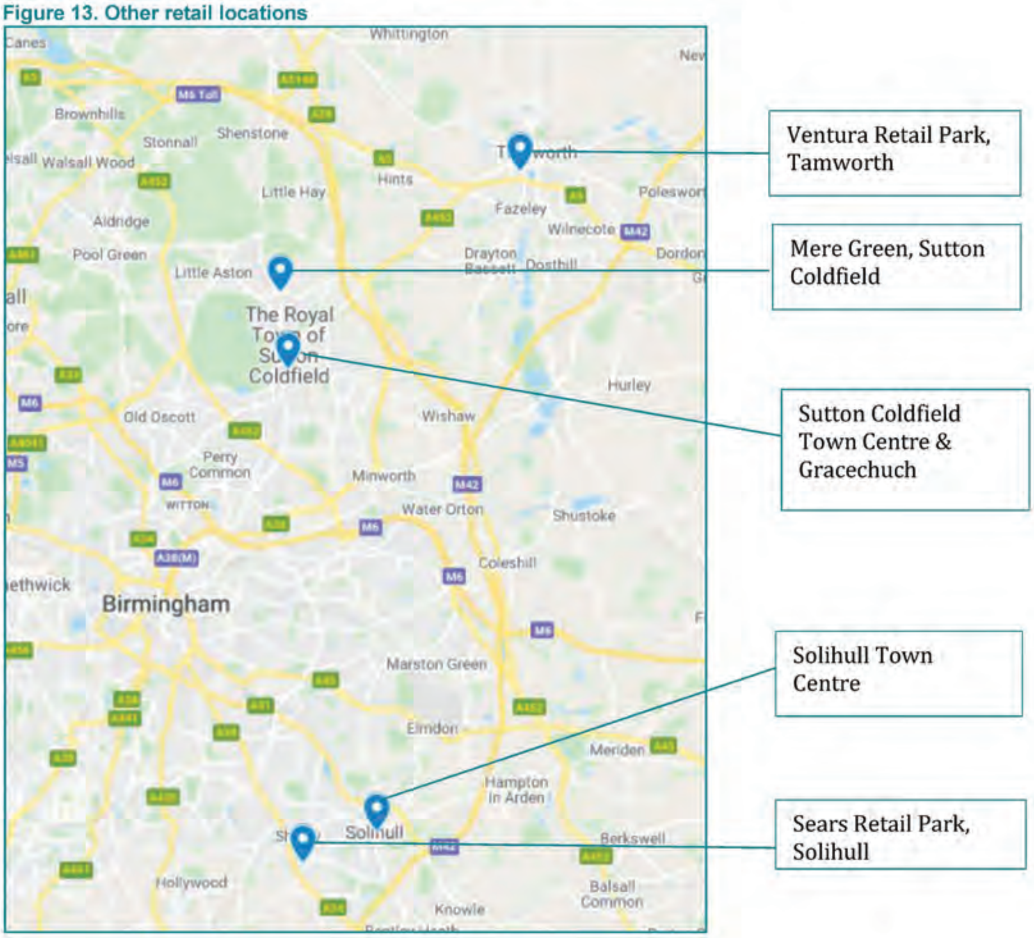
4.9 We spoke to Burley Brown, who are principle commercial agents in Sutton Coldfield. Their remit includes all of Sutton Coldfield town centre, excluding Gracechurch Shopping Centre. From 2017- early 2019, the secondary retail market was performing strongly. While independent and regional covenants are expressing interest in occupying space in Sutton

Coldfield the town centre lacks a sense of place and quality environment that has resulted in national retail brands relocating to the likes of Solihull, Ventura, and more locally, Mere Green. Thus, agents felt that the offering available at Mere Green is, in turn, reducing the demand for retail in Sutton Coldfield.

Other Retail locations

4.10 Figure 12, shows the location of other competing retail destinations that have been identified as having an impact on Sutton Coldfield's retail market performance and contributing to its decline. All other locations are within a 30-minute drive from Sutton Coldfield.

Figure 13. Other retail locations



Ventura Retail Park

4.11 Ventura Retail Park is a c.300,000 sq. ft purpose-built, 3 and 4-star retail park in Tamworth, 7.4 miles north-east of Sutton Coldfield. Ventura sits adjacent to Cardinal Point retail park and Jolly Sailor retail park. All three retail parks equate to approximately 600,000 sq. ft of retail units. The retail has attracted several UK leading retail brands including; Asda, Costa Coffee, Currys (featuring PC World and Carphone Warehouse), Greggs, Halfords, JD Sports, New Look, M&S, Next, Argos, John Lewis at Home, Nando's, Pizza Express, TK Maxx, Sainsbury's. Primark is due to open later this year.

Solihull Town Centre

4.12 Solihull town centre currently comprises of c.1.7million sq. ft of retail units with a vacancy rate of 1.6%. Current occupiers include Zara, Lush, Marks and Spenser, H&M, John Lewis, JD Sports, Next, Starbucks, Schuh, Clinique, Le Creuset, House of Fraser, Tesco and Sainsburys.

Sears Retail Park

4.13 Sears Retail Park, is in Solihull, 21.5 miles from Sutton Coldfield. The current whilst occupiers such as Toy 'R' Us and Homebase have recently closed, however, Symths Toys and Lidl have taken the vacant space. As a result, Sears Retail Park will maintain full occupancy. Other tenants include Boots, Hobbycraft, TK Maxx and M&S Foodhall.

Mere Green

4.14 The type of occupiers taking units in Mere Green are predominately food and beverage businesses, however, HSBS, Barclays Bank, Marks and Spenser food hall, Waitrose, and Argos are also located around Mulberry Walk.

Table 4-1: Key performance indicators per retail area

	Retail supply (sq. ft)	Market Rent (£ per sq. ft)	Percentage change on previous year (%)	Vacancy Rate (%)	Percentage change on previous year
Gracechurch	556,000	£22.35	-0.4	25.7	24.7
Sutton Coldfield Town Centre	1,300,000	£19.98	-0.2	12.7	10.7
Ventura Retail Park	291,000	£24.78	-0.1	0.0	-3.4
Solihull Town Centre	1,700,000	£43.55	-0.5	1.6	-0.8
Sears Retail Park, Solihull	216,000	£30	-0.3	0.0	0.0
Mere Green	230,000	£19.07	-0.3	3.1	-7.0

4.15 From all the six rental destinations listed above in Table 4.1, all market rents have declined at a similar rate. Both Solihull retail destinations are achieving high retail rental values, in comparison with the other locations. Solihull town centre is achieving rental values in the region of c.£44.00. Sutton Coldfield town centre and Gracechurch are the only retail locations with occupancy levels in decline; which further emphases the lack of retail demand and over-supply in Sutton Coldfield. M&G reported that Sutton Coldfield is around 30% over-supplied by retail. Additionally, Ventura Retail Park and Gracechurch have similar rental levels which provide further understanding to why retail brands may find it appealing to relocate to Ventura from Sutton Coldfield.

Summary

4.16 Data suggests that Sutton Coldfield's retail market has weakened while asking rents are similar to that achieved elsewhere in successful shopping districts and retail parks. This suggests that landowners and agents have not reacted to the contraction of Sutton Coldfield's retail market and rents are too high relative to Sutton's retail offering. The increase in vacancy rates from 2019 suggest a sharp decline in demand from consumers and occupiers. Closure of many high-street multiples has likely deterred new occupiers, and they are locating in areas such as Mere Green and Ventura Retail Park. Our data suggest that the current retail stock is in over-supply in relation to the current market demand.

4.17 The data in Table 4.1 is particularly striking and demonstrates that there is a retail crisis in Sutton Coldfield, and it is rapidly losing key retailers and consumer appeal with rising vacancy rates. It is failing to compete with competitor areas – including Solihull town centre and local retail parks. This trend is occurring in the context of Birmingham faring relatively well relative to the nationally challenging retail landscape.

5. Hotel and Commercial Leisure

Birmingham's Hotel Market

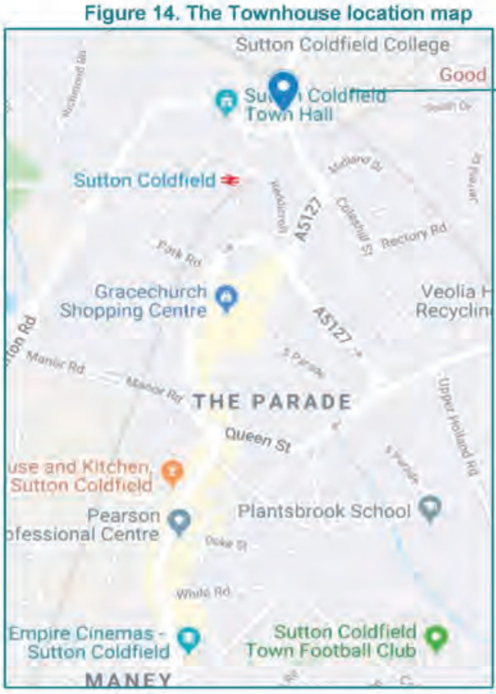
5.1 Birmingham has a strong and established UK conference and events market for corporate events. The growth in leisure and cultural events has continued on the back of the 2015 Rugby World Cup. Birmingham has recently been named as the host city for Coventry City of Culture 2021 and the 2022 Commonwealth Games which will result in further growth in the number of visitors to the West Midlands.

5.2 Knight Frank's hotel development index includes 41 cities across the UK. Birmingham has moved up four positions into joint 8th, following a strong performance in demand indicators. Regeneration of the city, combined with a strong base of business and leisure demand, have facilitated Birmingham's ability to absorb new supply (Knight Frank, 2018). A key performance measurement metric, Revenue per available room (RevPAR) is calculated by dividing a hotel's total guestroom revenue by the room count and the number of days in the period being measured. According to PwC's 2019 UK Hotels Forecast Update, Birmingham has experienced a 5% increase in Revenue Per Available Room (RevPAR); which is only behind other major destinations, such as Brighton, Gatwick and Liverpool. Yet, the region remains an affordable destination with the average room rate at £70.38 (PwC, 2019).

Sutton Coldfield Hotel Market

5.3 Figure 14, illustrates the location of The Townhouse, the only hotel within the town centre.

Figure 14. The Townhouse location map



The Townhouse Sutton

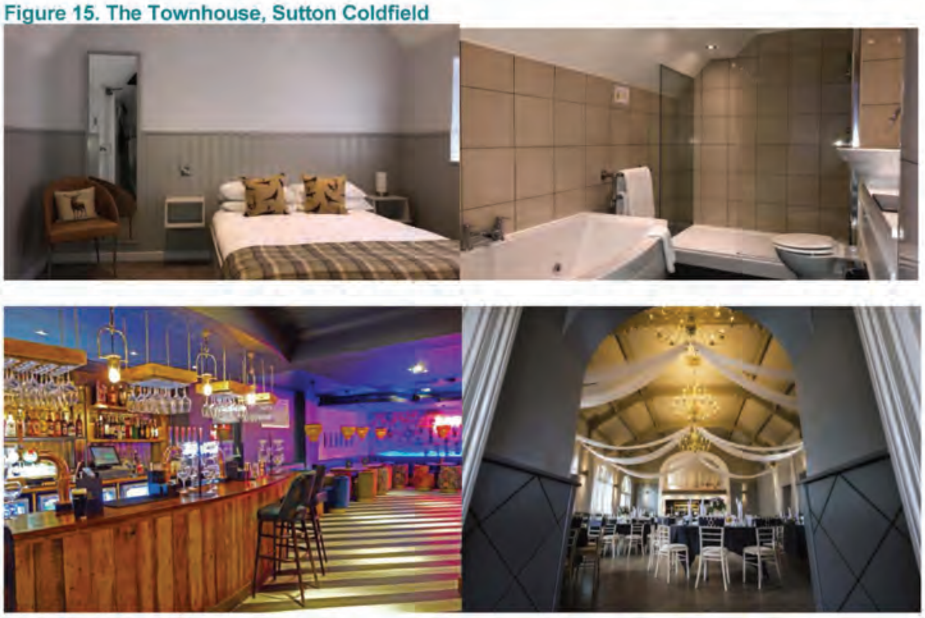
Source: GoogleMaps

SQW

22

5.4 All other types of accommodation in and around the town centre are holiday homes or apartments. The Townhouse Sutton, a boutique hotel offers 22 contemporary rooms, all with en-suite facilities, function room, and a bar. The Townhouse is located a short walk from Sutton Coldfield train station and is ideally located for access to the town centre. The price ranges from £70 - £100 per night. A single room is priced at £70 and a standard double is £80, including breakfast.

Figure 15. The Townhouse, Sutton Coldfield



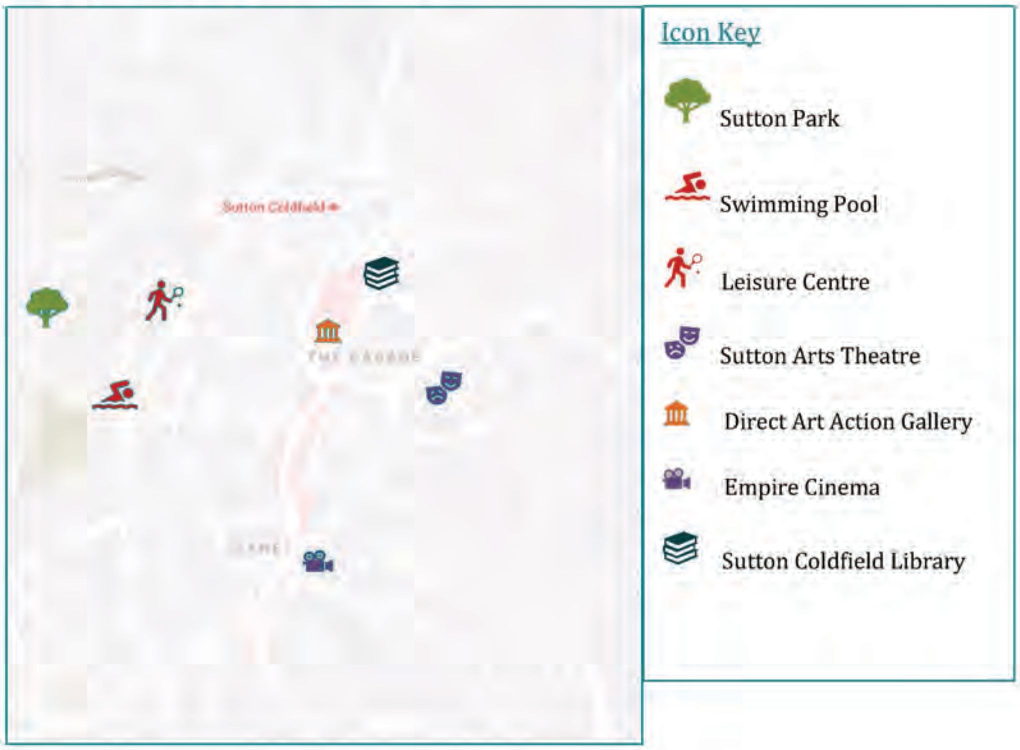
Source: Booking.com

5.5 It may be perceived that there is an undersupply of hotels within the town centre. It is therefore open to discussion that there may be an opportunity to expand the current provision.

Main leisure facilities in the Town Centre

5.6 Figure 16, below outlines the location of the main leisure facilities and visitor attractions in the town centre.

Figure 16, Location map of leisure facilities



5.7 Figure 16, emphases the spread of leisure facilities around the town centre and lack of leisure provision in the Parade. The Parade does not offer core neighbourhood facilities that attract people into the centre for purposes other than shopping.

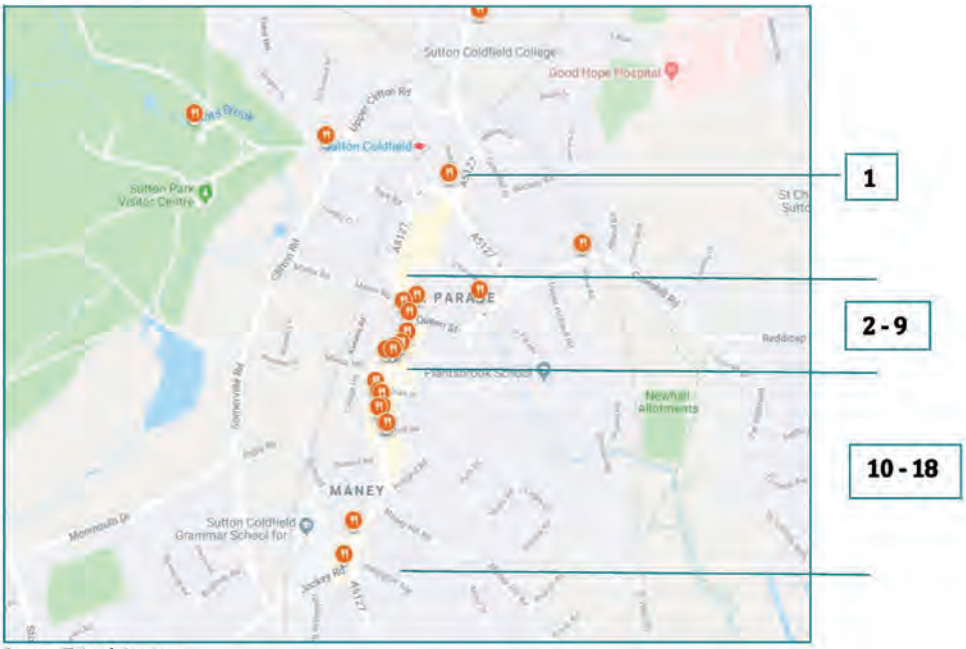
5.8 Additionally, here seems to be a general lack of leisure facilities for children in Sutton Coldfield. The nearest bowling alley, trampoline park, and ice skating rink are all located in Birmingham and are a 20 - 25-minute drive away from Sutton Coldfield Town Centre. The estate agents also commented on the lack of day and night-time facilities for teenagers to enjoy. While the leisure centre provides a variety of sporting activities for people of all ages, it has been noted that the leisure centre is in need of refurbishment work.

5.9 The switch on of this year's Christmas lights and Santa visit saw a c.6% increase in footfall in comparison to the previous year, suggesting that there is an appeal for family orientated events and activities within the town centre.

Night-life activity

5.10 Sutton Coldfield boasts an array of bars and restaurants that are located to the south of The Parade along Birmingham Road (figure 17).

Figure 17. Location of the main restaurants



Source: Tripadvisor.com

5.11 The main restaurants within the site boundary are as follows:

Table 5-1: Current provision of food and beverage businesses.

Number	Name	Type of facility	Opening Time
1	Station Sutton Coldfield	Pub serving food	Weekday 12:00 - 23:00, Weekend 11:00 - 01:00
2	TGI Fridays	American restaurant	Weekday 12:00 - 22:20, Weekend 11:30 - 23:00
3	Nando's	Portuguese restaurant	Weekday 11:30 - 22:00, Weekend 11:30 - 23:00
4	Ask Italian	Italian restaurant	Weekday 11:30 - 22:00, Weekend 11:30 - 23:00
5	The Bottle of Sack	Pub serving food	Monday – Saturday 08:00 - 00:00, Sunday 08:00 – 23:00
6	Pizza Express	Italian restaurant	Weekday 11:30 - 22:00, Weekend 11:30 - 23:00
7	Slug and Lettuce	Bar serving food	Weekday 10:00 - 23:00, Weekend 10:00 - 00:00
8	Quinto Lounge	Casual cafe & lounge	Weekday 10:00 - 23:00, Weekend 10:00 - 00:00
9	Brewhouse and Kitchen	Brewpub serving food	Weekday 11:00 - 23:00, Weekend 11:00 - 00:00
10	Bodega Cantina	Brazilian restaurant	Weekday 17:00 – 22:00, Fri-Sat 12:00 – 00:00,

			Sun 12:00 – 00:00
11	Sangria	Spanish restaurant	Weekday 17:00 - 23:00, Weekend 12:00 - 23:00
12	Pizza by Goli	Italian Restaurant	Weekday 12:00 – 14:30, 17:00 – 23:30 Weekend 12:00 - 23:30
13	Craft Inn	Bar	Weekday 16:00 - 23:00, Weekend 14:00 - 23:00
14	Bhaijaans	Indian restaurant	Weekday 17:00 – 22:30, Fri-Sat 17:00 – 23:00, Sun 12:00 – 22:30
15	Lee Garden	Chinese rating	Weekday 12:00 – 14:30, 18:00 – 23:30, Fri-Sat 12:00 – 23:30, Sun 12:00 – 22:30
16	Eleon	Mediterranean, Greek restaurant	Weekday, Friday and Saturday 13:00 – 21:00, Sunday 13:00 – 21:00
17	Panache Premier Indian Dining	Indian restaurant	Weekday 17:30 – 23:00, Weekend 17:30 – 23:30
18	The Purple Rooms	Indian restaurant	Weekday and Weekend 17:30 – 23:30

Source: Tripadvisor

5.12 Approximately 75% of the night-time offering along Birmingham Road are restaurants, with the remaining offering ranging from hotel bars, bars, and nightclubs. The current provision of bars is listed below, please note that there will be some overlap as some restaurants, such as Slug and Lettuce, Brewhouse, and Quinto Lounge stay open late and have more of a bar feel moving into the later hours of the evening. Nightclubs include LvL:1 – Level One Lounge, which is open till late. Rumour Nightclub was listed for sale in 2018, limited demand for the space has meant that no leisure provider has taken the space.

Figure 18, Location of bars and nightclubs in the town centre

Source: Googlemaps.com

5.13 Local estate agents stated that both restaurants and bars along Birmingham road have a good night-time trade. However, two restaurants have recently closed due to financial instability. Larger chain restaurants tend to be located closer to the Gracechurch Centre and as smaller, independent restaurants tend to occupy smaller premises located from the middle to the south section of Birmingham Road. The current food and beverage offering is mostly budget-focused which detracts from the affluent local population. Mere Green, located 1.1 miles north of the town centre has established a strong position for higher-end dining. Bistrot Pierre, Prezzo Italian, Gusto and an array of independent restaurants occupy Mulberry Walk in Mere Green. Subsequently, the offering at Mere Green has reduced Sutton Coldfield's footfall as people looking slightly higher-end restaurants tend eat in Mere Green.

5.14 Furthermore, local agents expressed the need for creating a safer environment along Birmingham Road to allow people to move safely and freely from one bar to another. Traffic, pollution and noise levels along Birmingham Road also decrease the daytime appeal of this area. There is no definite location for people to congregate. M&G Investments (owner of Gracechurch) reported that there is currently no demand for food and beverage in the centre, however, the lack of leisure supply may be constraining demand. Local agents explained that some food and beverage businesses would prefer to be in Gracechurch to utilise the footfall in and around the centre of town. Nevertheless, high rental prices and limited leisure supply have restricted potential restaurant providers moving into the town centre.

Summary

5.15 The food and beverage industry in Sutton Coldfield is experiencing good trade, however, improving the safety along Birmingham Road would improve the attractiveness of the immediate area. The current location of food and beverage businesses and leisure facilities are very spread out with very few businesses located in and around Gracechurch or The Parade apart from a selection of cafes. Taking into consideration the desire from businesses to move closer to the town centre, there may be an opportunity to increase the food and beverage offering around the Gracechurch and The Parade. Additionally, the relocation of the cinema and increase of other leisure activities within the centre of town should be open for discussion.

6. Office Market

Birmingham's Office Market

6.1 Owing to Birmingham's diverse and growing employment pool, Birmingham's office market has been buoyant in recent years. Over the past five years, the number of highly-skilled jobs in Birmingham has increased by 17%, international companies such as WSP, Barclays, ACS, and RICS have relocated parts of their business to Birmingham (Knight Frank, 2018). Within Birmingham's City Core there is a high demand for Grade A offices and co-working providers accounted for 22% of Birmingham's total office take up from 2016 – 2018 (Knight Frank, 2018). Birmingham currently has 48.7 million sq. ft of office space and a further 1.3 million sq. ft of offices under construction. The average market rent is £16.42 per sq. ft; representing a 2.6% year-on-year increase.

Outer Birmingham's Office Market

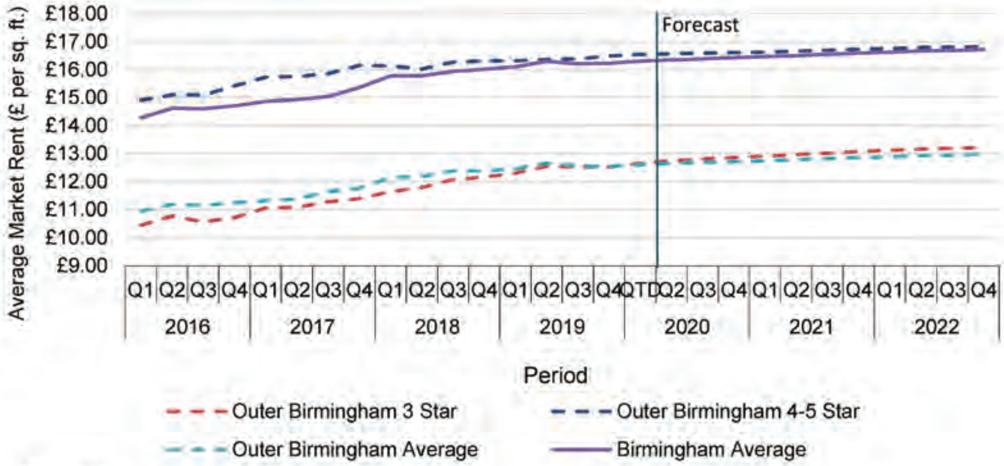
6.2 To understand the dynamics of the Outer Birmingham's office market excluding Birmingham city, we utilised CoStar's analytic services to assess this submarket. Figure 18, illustrates the boundary of Outer Birmingham's submarket. The submarket is sandwiched between West Bromwich and Walsall to the west and Solihull to the east and comprises of almost one-fifth of the office space in greater Birmingham. At less than 3%, the vacancy rate within this submarket is among the lowest in Birmingham, where the average vacancy rate is approximately 6%.

Figure 19. Outer Birmingham submarket boundary map

Source: CoStar

6.3 Outer Birmingham's average office rents are approximately £12.63 per sq. ft.; 23% lower than Birmingham's average price per sq. ft. Annual rental gains of about 3.7% in the Outer Birmingham Submarket have been slightly stronger than Birmingham City's year-on-year rental growth. Figure 20, illustrates the difference in average rental values achieved in grade A (4-5 5stars) and B (3-star) offices between Birmingham & Outer Birmingham.

Figure 20. Average office market rental comparison between 3 and 4-5-star offices in Birmingham and Outer Birmingham



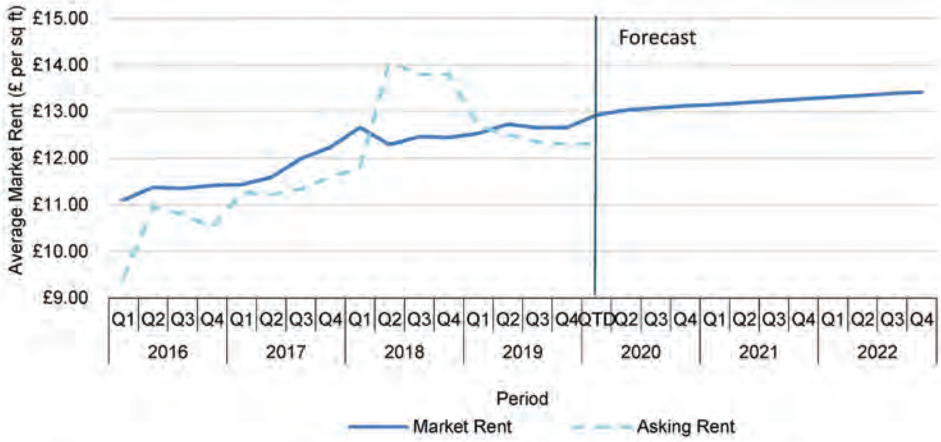
Source: CoStar

6.4 Office space in Outer Birmingham is overwhelmingly 3-Star (Grade C) space, with less than 10% rated 4 & 5 Star (Grade A). The last office delivery in Outer Birmingham was the 28,000 sq. ft development called, Seven House, in Longbridge, 30 miles from Sutton Coldfield, indicating that no new office developments have been brought forward in and around Sutton Coldfield.

Sutton Coldfield Office Demand

6.5 Our findings suggest that within the town centre site boundary there are 344,000 sq. ft of office space, all of which are classified as Grade B or C units and are below 2000 sq. ft in size (CoStar, 2020). Over the past 12 months preceding January 2020, the net absorption of office space was 4,200 sq. ft. The average market rent per sq. ft is £12.93, rental values have steadily increased over the past 4 years (Figure 21). However, there has been very limited office development under construction since 1980, and as a result vacancy rates are at only 1.3%. Low vacancy rates have been aided by the loss of office stock to residential use. The former office block, Knights House, previously mentioned in the residential section of the report is a prime example. The lack of additional supply has kept vacancy rates low, however, as a result the true demand for office stock has not been tested.

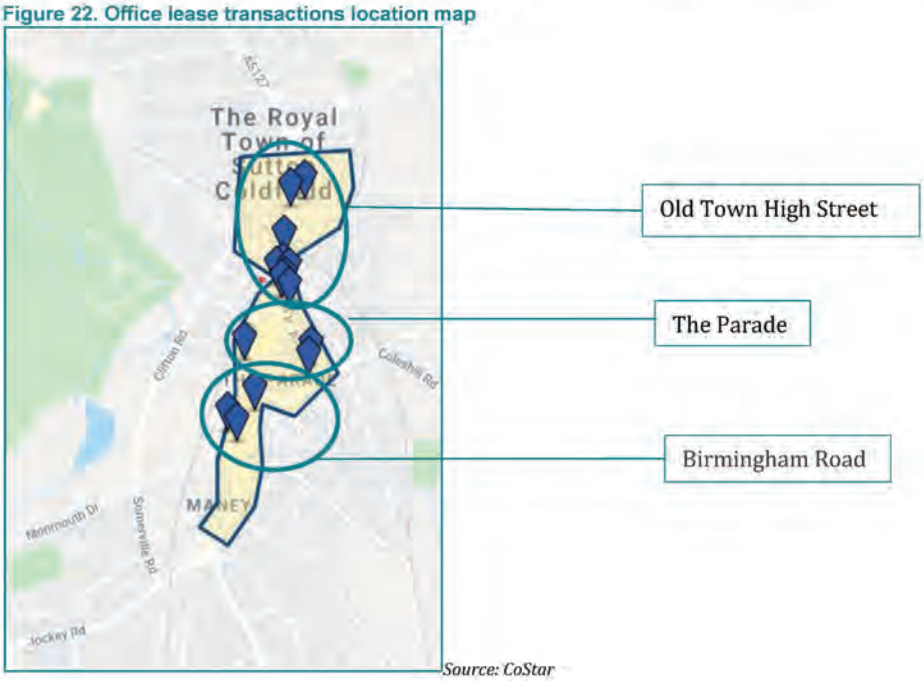
Figure 21. Average market rent from 2015- present, forecast from present - 2022



Source: CoStar

6.6 Figure 22, illustrates the location of office transactions from 2016 – 2019. Most of the office leasing activity has been concentrated around the High Street in the old town. The old town High Street provides vital support and accommodation for primarily professional family firms, estate agents and recruitment consultants. Thus, indicating that there is a good demand for small office spaces. The Victorian and Edwardian buildings in the High Street area provide well-presented, office developments dating from the late 80s.

Figure 22. Office lease transactions location map



Source: CoStar

6.7 Outside of the High Street, office lease transactions are limited. From 2016 – 2019, CoStar identified three leasing transactions in each of the two-other core areas; The Parade and Birmingham Road. Table 1, 2 and 3 in Annex B, outline the individual lease transactions from 2016 – 2019 in each core area within Sutton Coldfield.

6.8 Our analysis indicated that offices under 1,000 sq. ft make up the largest proportion of the office transactions followed by offices sized between 1,000 – 1,500 sq. ft and 1,500- 2,500 sq. ft, 48%, 23%, 17%, respectively. Only two historical transactions were greater than 2,500 sq. ft.

6.9 Agents expressed concern regarding the slowdown of the office market in Sutton Coldfield. Professional firms are still attracted by the traditional affluence of Sutton Coldfield. However, the lack of quality space above 1,600 sq. ft is said to be holding back the business community. Burley Brown reported that as businesses grow, they are effectively growing out of the office stock in Sutton Coldfield and having to relocate in order to find office accommodation that meets their size and quality requirements.

Grade A & B Office Stock surrounding Sutton Coldfield

6.10 SQW searched for Grade A and B office space in surrounding areas including Tamworth, Lichfield, Solihull. Figure 23, illustrates the boundary SQW created to complete this analysis of Grade A and B space. The majority of quality office stock over 2,500 sq. ft is located around Solihull, Marston Green and Minworth, this may be due to the proximity of major highways such as M6 and M42 and Birmingham International Airport. All offices were built after 2000. This indicates the lack of quality Grade A or B office development around Sutton Coldfield in recent years.

Figure 23. Location of Grade A and new Grade B office stock

Source: CoStar

6.11 All three offices located around Lichfield (15,210sq. ft), Tamworth (25,100sq. ft) and Minworth (14,880 sq. ft) are high-quality grade B stock. The rental value per annum of the two offices located near Tamworth and Minworth ranges from £15-19 per sq. ft. Whist, CoStar estimates the office located in Fradley Business Park, Lichfield to achieve rental value ranging from £12-15 per sq. ft per annum.

Solihull's Employment Stock

6.12 Solihull offers approximately 550,00 sq. ft of office stock located in Blythe Valley Park, Solihull Business Park, Cranmore Drive and Fore Business Park. Lease transactions suggest that offices range from 1,900- 58,000 sq. ft in size and tend to achieve a market value of c.£22 per sq. ft. Vacancy rates have declined by 3.6% from the previous year and now sit at around 1.7%.

Marston Green's Employment Stock

6.13 Marston Green's office stock equated to approximately 350,000 sq. ft of office space that command a rental market value of c.£22 per. sq. ft. The current vacancy rates have remained unchanged and all offices are at full occupancy.

New commercial development around Sutton Coldfield

Peddimore Heath (Planning application number: 2019/00108/PA)

Source: Peddimore Supplementary Planning Document

6.14 Associated with the Langley Sustainable Urban Extension, is Peddimore Heath, a 71-hectare site with the potential to accommodate 251,000 sq.m of industrial and logistic space. A hybrid planning proposal was approved by Birmingham City Council on 15th August 2019. It includes an outline application for an employment park comprising B1b, B1c B2 and/or B8 uses, including ancillary offices (B1a), and community facilities (D1/D2/B1a/A3/Sui Generis) including a multi-purpose hub building and associated development. Along with, a full planning application for a road and cycle infrastructure work.

Whilst the final layout will be determined by market demand, the current illustrative masterplan suggests the site has capacity to deliver over 2.49 million square foot of warehouse space, with 165,000 square foot of accompanying office space (Figure 22). Peddimore development aim to create up to 6,500 direct jobs and up to 3,000 supply chain jobs across the West Midlands to support the site's future manufacturing and logistics occupiers. The first bespoke buildings are due to be completed and ready for occupation by Q3 2021.

Figure 24. Two illustrative masterplans of Peddimore employment buildings

Source: Peddimore Supplementary Planning Document

6.15 Whilst, Peddimore site is located to the north of Minworth, 3.6 miles from Sutton Coldfield to the east of the A38 and to the north of the A4097 Kingsbury Road. The employment park will be within commutable distance (12-minute drive) from Sutton Coldfield town centre, which may influence the number of people choosing to live in Sutton Coldfield.

Figure 25. Peddimore Employment Park site location map.

Source: Googlemaps.com

6.16 Furthermore, whilst the employment park seeks to dramatically increase in supply of office space in and around Sutton Coldfield. This high-quality development aims to attract national and international manufacturing and logistic businesses. This may not directly affect Sutton Coldfield's office market and the businesses currently located in Sutton Coldfield as the majority of which are a service economy rather than a manufacturing economy. However, this is open to discussion.

Summary

6.17 Sutton Coldfield's current office market comprises of mostly small, low-quality units under 1,600 sq. ft located on the High Street of the old town. Professional service-type businesses such as solicitors, recruitment agencies, and estate agents tend to occupy offices in Sutton Coldfield. The lack of office development since the 1980's has constrained the market and as result vacancy rates are low, however, rents have remained around £11- 13 per sq. ft. The development of Peddimore Employment Park will increase the office stock around Sutton Coldfield with the aim to attract manufacturing and logistic tenants. It is, therefore, unlikely that Peddimore will be attract Sutton Coldfield's professional service industry. However, it may attract new businesses into the area. Despite the low vacancy rate, the relatively low rental levels in Sutton Coldfield may present a barrier to viable office development, without cross subsidy from other forms of development.

7. Conclusion

7.1 Sutton Coldfield's total population has declined from 2011-2018; however, Sutton Trinity Ward population has increased during the same period. Data suggests an increase in the population of over 65s drove Sutton Trinity's population growth. The population growth of retirement-aged people suggests that residential development within the town centre should consider specific retirement provision to accommodate the ageing population.

7.2 House prices in Sutton Coldfield are high in comparison to other surrounding areas and local estate agents confirmed that they felt there was a demand for town centre living. The price and speed of sale of apartments at Knight's House should provide a clear indication of demand; which should be monitored moving forward.

7.3 Sutton Coldfield cannot continue to rely on its retail offering to attract footfall and generate a prosperous town centre. The over-supply of retail, coupled with no leisure offering within the town centre, has weakened the market further. The rapid increase in vacancy rates suggests the market is in crisis and other locations, including Ventura retail park and Solihull, are more attractive locations for occupiers.

7.4 The current leisure provision of leisure is spread across the town centre, only the local library is within the Parade. The cinema needs refurbishment, and its current location pulls people away from the town centre. The local pure gym is over-subscribed, suggesting that further leisure provision would be beneficial. Mere Green has attracted higher-end restaurants and bars; as a result, Sutton Coldfield's food and beverage offering are budget-orientated. All estate agents that we spoke to highlighted that the environment along Birmingham Road felt to be unsafe and unattractive and need to be improved to attract more consumers, who tend to go to Mere Green to dine.

7.5 The lack of new office development has meant that the demand for offices is difficult to quantify. The loss of stock to residential development has further constrained the market. The average market rent in 2020 is approximately £13 per sq. ft. While occupancy levels are at 98.7%, and stock typically ranges from 250-1,600 sq. ft with a limited number of offices over 2,000 sq. ft. The lack of space over 2,000 sq. ft is said to be negatively impacting businesses as they need to relocate out of Sutton Coldfield to find accommodation that caters for their size and quality requirements.

Annex A: Retail Lease Transactions

Table A.1. Old Town High Street lease transactions

Sign Date	Total SF Leased	Rent per annum	Rent per sq. ft per annum	Rent Type
2018	1,219	£32,000.00	£26.25	Achieved
2018	2,344	£65,000.00	£27.73	Asking
2017	566	£15,000.00	£26.50	Asking

Source: CoStar

Table A.2. The Parade lease transactions

Sign Date	Total SF Leased	Rent PA	Rent per sq. ft per annum	Rent Type
2019	3,302	£40,000.00	£12.11	Asking
2018	1,284	£75,000.00	£58.41	Asking
2017	2,054	£75,000.00	£36.51	Asking
2017	2,480	£35,000.00	£14.11	Asking
2017	8,438	£69,499.61	£8.24	Effective
2016	2,878	£135,000.00	£46.91	Effective

Source: CoStar

Table A.3. Gracechurch lease transactions

Sign Date	Total SF Leased	Rent PA	Rent per sq. ft per annum	Rent Type
2017	6,095	£82,373.32	£13.51	Effective
2017	17,266	£93,151.13	£5.40	Effective
2017	3,468	£68,874.32	£19.86	Effective
2017	250	£18,247.76	£ 72.99	Effective
2017	12,892	£172,928.12	£13.41	Effective
2016	2,206	£47,353.17	£21.47	Effective
2016	2,054	£53,738.52	£26.16	Effective
2016	3,857	£93,331.28	£24.20	Effective
2016	3,092	£55,597.08	£17.98	Effective
2016	1,051	£35,033.20	£33.33	Effective

Source: CoStar

Table A.4. Birmingham Road lease transactions

Sign Date	Total SF Leased	Rent Per Annum	Rent per sq. ft per annum	Rent Type
2019	685	£18,000.00	£26.28	Asking
2019	379	£22,500.00	£59.37	Asking
2019	1,823	£28,500.00	£15.63	Asking
2018	515	£13,500.00	£26.21	Achieved
2018	760	£18,000.00	£23.68	Asking
2018	1,172	£30,000.00	£25.60	Asking
2018	3,754	£26,384.77	£7.03	Effective
2017	405	£15,950.00	£39.38	Asking
2017	760	£18,000.00	£23.68	Asking

2017	1,197	£24,999.55	£20.89	Effective
2016	2,010	£37,500.00	£18.66	Asking

Source: CoStar

Annex B: Office Lease Transactions

Table B.1. Old town High Street office leasing transactions

Sign Date	Total sq. ft leased	Rent per sq. ft per annum	Rent Type
2019	684	£11.33	Asking
2019	915	£10.87	Asking
2018	394	£24.75	Effective
2018	1,214	£13.87	Asking
2017	455	£17.03	Asking
2017	1,361	£12.33	Asking
2017	2,136	£11.93	Asking
2016	227	£20.62	Asking
2016	845	£10.65	Asking
2016	1,130	£10.18	Asking
2016	1,632	£11.00	Effective
2016	1,844	£12.20	Asking
2016	2,660	£12.80	Effective
2016	8,708	£12.50	Asking

Source: CoStar

Table B.2. The Parade office leasing transactions

Sign Date	Total sq. ft leased	Rent per sq. ft per annum	Rent Type
2019	1,035	£12.56	Asking
2018	417	£21.22	Achieved
2017	770	£11.69	Asking

Source: CoStar

Table B.3. Birmingham Road office leasing transactions

Sign Date	Total sq. ft leased	Rent per sq. ft per annum	Rent Type
2018	1400	£10.71	Achieved
2018	559	£9.84	Achieved
2017	450	£11.66	Asking

Source: CoStar