BLACK COUNTRY CENTRES STUDY REFRESH – CITY OF WOLVERHAMPTON SUPPLEMENTAL

Summary Report

Prepared for:

City of Wolverhampton Council

November 2024

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For and on behalf of Lambert Smith Hampton

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1. INTRODUCTION

1. Lambert Smith Hampton (LSH) was jointly commissioned by the City of Wolverhampton Council (CWC); Dudley Metropolitan Borough Council (DMBC), Sandwell Metropolitan Borough Council (SMBC) and Walsall Council (WC) hereafter 'The Black Country Local Authorities (**BCLA**)' to update and provide a 'refresh' to the key findings of the following studies that had informed the emerging Black Country Plan (**BCP**):

   - the '2020 Black Country Centres Study'
   - the '2021 Black Country Centres Study Update' that took account of the impacts of the Covid-19 pandemic and the then latest available forecasts. It also accounted for the BCP period extending to 2039 and changes to the planning system (such as changes to the use-class and permitted development rights).
   - the '2022 Black Country Centres Study' – Addendum' that updated and on the findings of the 2020 and 2021 studies.

2. In the course updates, and when commissioned, changes to the diversity of uses across strategic and other centres was provided.

3. As part of the 2024 'Refresh' of the Black Country Centres Study, the City of Wolverhampton Council separately commissioned LSH to provide a high level review data update on the diversity of uses for the following centres: Wolverhampton City Centre, Bilston Town Centre and Wednesfield Town Centre.

4. On this basis and for ease of reference the required outputs based on the latest available floorspace and outlet data are structured in the report by centre as follows:

   - **Section 2**: Wolverhampton City Centre
   - **Section 3**: Bilston Town Centre
   - **Section 4**: Wednesfield Town Centre
   - **Section 5**: Potential for Residential

2. WOLVERHAMPTON CITY CENTRE

5. A new Category Goad Report obtained from Experian was based on a survey undertaken in May 2023. This shows that the total number of outlets has decreased by 50 units from September 2019 to May 2023. To note that over the period 2022 to 2023 there was a decrease of 26 units.

Table 1: Wolverhampton: Change in Number of Outlets & Floorspace 2019 - 2023

Category	2019	2019	2020	2020	2022	2022	2023	2023
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	57	4,989	56	4,998	51	5,045	48	4,571
Comparison	189	64,874	186	61,651	186	61,595	186	62,570
Retail Service	94	8,668	87	8,278	78	7,219	77	6,912
Leisure Service	157	34,393	149	33,176	157	33,436	136	28,837
Financial and Business Service	76	15,496	72	15,097	69	14,502	65	13,239
Vacant	161	40,850	164	42,717	170	46,061	174	47,399
Other Retail	2	167	2	167	1	74	0	0
Total	**736**	**169,437**	**716**	**166,083**	**712**	**167,932**	**686**	**163,528**

Source: GOAD Category Reports: 06/09/2019; 07/07/2020; 20/01/2022 and 01/05/2023

Category	Change: 2019 - 2022		Change: 2019 - 2023		Change: 2022 - 2023	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	-6	56	-9	-418	-3	-474
Comparison	-3	-3,279	-3	-2,304	0	975
Retail Service	-16	-1,449	-17	-1,756	-1	-307
Leisure Service	0	-957	-21	-5,556	-21	-4,599
Financial and Business Service	-7	-994	-11	-2,258	-4	-1,263
Vacant	9	5,211	13	6,550	4	1,338
Other Retail	-1	-93	-2	-167	-1	-74
Total	**-24**	**-1,505**	**-50**	**-5,909**	**-26**	**-4,404**

6. In the period September 2019 to May 2023, the largest reduction has been in the categories of retail, leisure and financial services (a decrease of some 49 units). In terms of specific categories, and notable decreases, Health & Beauty outlets have decreased from 68 units in 2019 to 58 units in 2023; Confectionery, Tobacco, and

News units (CTN's) halved from 12 units in 2019 to 6 units in 2023 and betting offices diminished from 11 units to 5 units in the same period.

7. Vacant units have increased by 13 units over the period 2019-2023 compared with 9 units over the period 2019-2022.

8. Compared to the current UK average, the mix of outlets by sector in Wolverhampton is largely similar to the national picture in the categories of comparison goods (27.1% compared to 26.4% nationally) and financial and business services (9.5% compared to 8.3%). However, there is a larger divergence in leisure services (19.8% vs 25.8%); retail services (11.2% compared to 15.9%) and vacant outlets (25.4% vs a 14.1% national average). The provision of convenience outlets is also comparatively lower (7% compared to 9.3%).

Table 2: Wolverhampton: Outlets & Floorspace 2023

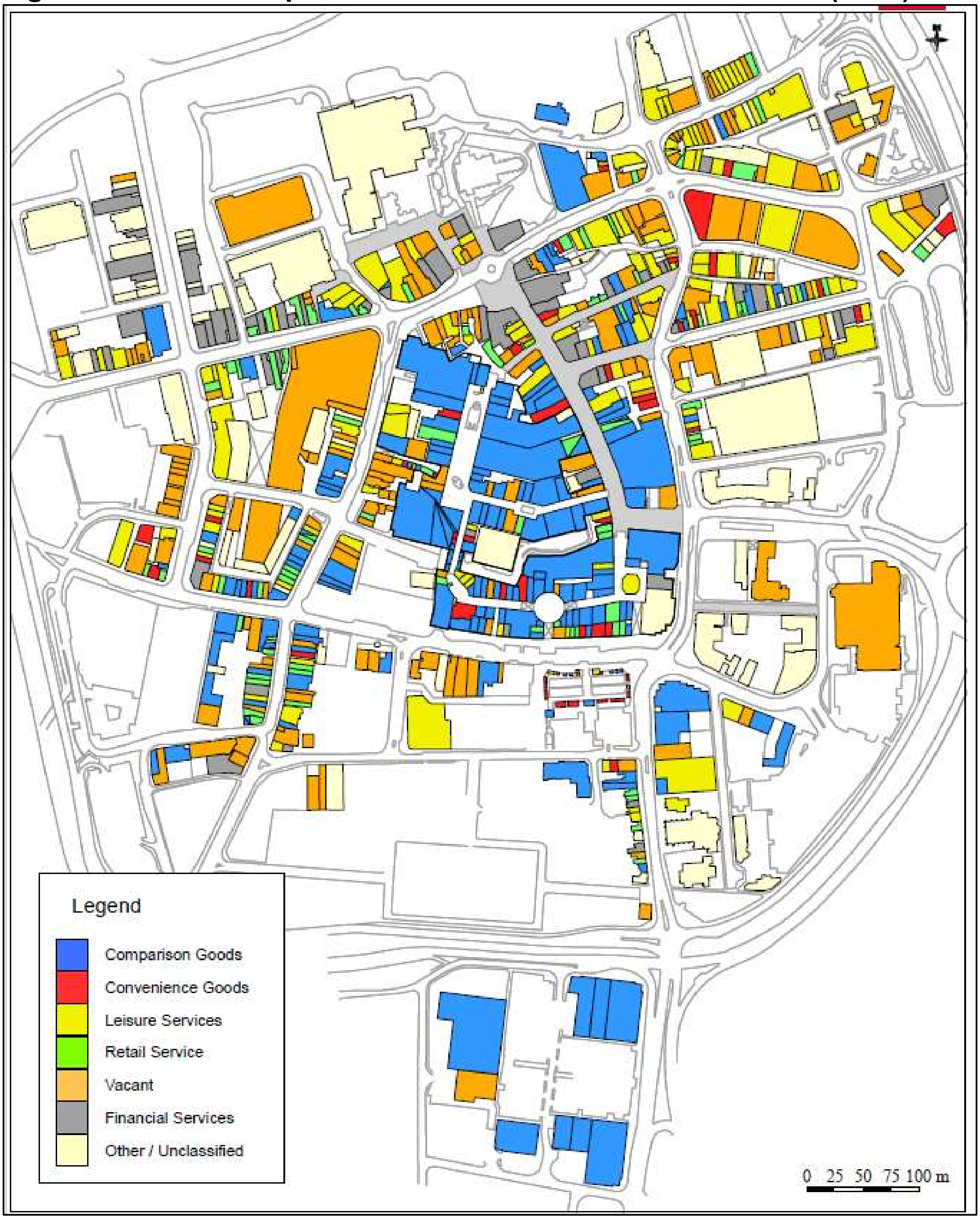
WOLVERHAMPTON	% of Total Outlets			% of Total Floorspace		
Category	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	48	7.00%	9.31%	4,571	2.80%	15.57%
Comparison	186	27.11%	26.40%	62,570	38.26%	29.42%
Retail Service	77	11.22%	15.90%	6,912	4.23%	7.31%
Leisure Service	136	19.83%	25.76%	28,837	17.63%	26.66%
Financial and Business Service	65	9.48%	8.33%	13,239	8.10%	6.25%
Vacant	174	25.36%	14.11%	47,399	28.99%	14.18%
Other Retail	0	0.00%	0.06%	0	0.00%	0.04%
Total	**686**	**100%**	**100%**	**163,528**	**100%**	**100%**

Source: GOAD Category Report 01/05/2023 and UK average as at 2024

9. In terms of floorspace, Wolverhampton shows greater variance to the UK average. It only has 2.8% of its floorspace in the convenience sector, compared to 15.6% nationally – a trend that has stayed static from previous updates. This is influenced by nearby convenience provision at locations outside of the Goad survey area, such as the Sainsbury's store at St Mark's and the Asda at Molineux. In contrast, comparison goods floorspace is significantly higher (38.3% compared to 29.4% nationally). Other noticeable differences reflect trends in outlet numbers, showing less floorspace in the retail and leisure services. Similarly financial and business services floorspace is higher than the national average (8.1% compared to 6.3% nationally). The proportion of vacant floorspace is considerably higher (29% compared to 14.2% nationally), following the equivalent trend in outlet numbers; but it should be noted that the vacant floorspace figures included locations that were not trading at the time of survey but are subject to regeneration such as The Halls Wolverhampton, former Beatties Store and St George's Parade.

10. The figure below shows distribution of town centre uses across the city centre.

Figure 1: Wolverhampton: Distribution of Town Centre Uses (2023)



Source: Goad Survey: May 2023

11. The map based on the latest Goad survey reinforces the previously identified clusters of comparison uses in the heart of the centre including the Mander Centre and its surroundings; the other is at the St John's Retail Park. The map also shows the comparatively lower and smaller number of convenience outlets. Whilst the size of vacant outlets is prominent, they included large units not trading at the time of survey but are subject to regeneration such as The Halls Wolverhampton.

12. The latest GOAD category report (May 2023) survey shows the centre had 17 of the largest major retailers; which is a good level of representation. This is a similar number to 2022 but marginally lower than the 19 recorded in 2020.

Table 3: Wolverhampton Experian Goad list of Major Comparison Retailers 2022-2023

Retailer	Jul-20	Jan-22	May-23
Argos	No	No	No
Boots the Chemist	Yes	Yes	Yes
Burton	No	No	No
Carphone Warehouse	Yes	No	No
Clarks	Yes	Yes	Yes
Clintons	Yes	Yes	No
Debenhams	No	No	No
Dorothy Perkins	No	No	No
EE	Yes	Yes	Yes
H&M	Yes	Yes	Yes
HMV	Yes	Yes	Yes
House of Fraser	Yes	No	No
John Lewis	No	No	No
Marks & Spencer	Yes	Yes	Yes
Monsoon	No	No	No
New Look	Yes	Yes	Yes
Next	Yes	Yes	Yes
O2	Yes	Yes	Yes
Primark	Yes	Yes	Yes
River Island	Yes	Yes	Yes
Sainsbury’s	Yes	Yes	Yes
Superdrug	Yes	Yes	Yes
Tesco Extra	No	No	No
TK Maxx	No	No	No
Topman	No	No	No
Topshop	No	No	No
Vodafone	Yes	Yes	No
Waitrose	No	No	Yes
Waterstones	Yes	Yes	No
WHSmith	No	No	Yes
Wilkinson’s	Yes	Yes	No
Total	**19**	**17**	**17**

Source: Goad Surveys: July 2020; January 2022 & May 2023

13. In terms of key retailers that have moved in or moved out between 2022 and 2023 include:

Table 4: Wolverhampton Key Movers (2022-2023)

Moved In	Moved Out
MenKind	Wilko
Select Fashions	Vuse
Cards Direct	Burger King
KFC	Clintons
Rio's Piri Piri	Ladbrokes
	Stonegate Pub Company
	Subway
	Toni & Guy
	Virgin Money

Source: PMA Promis 2024

14. As previous updates have detailed, the Council has a good track record on securing capital funding from central government and promoting regeneration including:

- **Future High Street Fund Programme**: Transformation of the west side of the city centre through the creation of new events space and high-quality public realm enhancing cross city connectivity with walking and cycle routes.

- **Wolverhampton Town Deal**: A new city events and culture programme maximising the investment in events space and public realm through the Future High Street Fund.

- **City Learning Quarter**: £20 million secured through Levelling Up Round 1. The scheme will deliver a c.£60m state-of-the-art learning hub in the heart of the city.

- **Wolverhampton Investment Prospectus Phase 1**: Delivering regeneration projects in the city by creating aspirational, mixed-use city centre community blending living, alongside employment and leisure space.

- **Canalside:** The Council has concluded the selection of a preferred developer to deliver the Canalside South scheme – one of the largest city centre residential development opportunities in the Midlands.

- **Green Innovation Corridor – Phase 1**: Building on the city's strengths as the National Centre for Sustainable Construction. This aims to further stimulate wider regeneration along the corridor by acting as a catalyst for additional private sector investment in the Science Park and unlocking brownfield sites for sustainable and affordable housing provision.

- **Levelling Up Zones and West Midlands Investment Zone**: The Council is working with the West Midlands Combined Authority to develop a West Midlands Investment Zone proposition centred on the Green Innovation Corridor.

- The City of Wolverhampton was also invited by Government in 2023 to be part of only 10 '**pathfinder**' local authorities across England to pilot a simplified approach to funding delivery as recipients of the Future High Street Fund, Towns Fund and Levelling Up Fund Round 1.

3. BILSTON TOWN CENTRE

16. The new category report for Bilston was based on a survey that was conducted in October 2023. This shows that since 2018, the centre has lost 7 outlets - the same quantum as between 2018-2021. In terms of the changes to number of units by category type, in broad terms, there is marginal movement that does not demonstrate significant transitional trends. The only exception is for vacancies. The 2023 data indicates a higher level of vacant units (35) when compared to the past (29 units in 2018 and 26 in 2021).

Table 5: Bilston: Change in Number of Outlets & Floorspace 2018 - 2023

Category	2018		2021		2023	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	31	14,799	30	15,097	29	14,707
Comparison	61	11,789	58	10,368	55	10,015
Retail Service	32	3,437	34	3,837	36	3,967
Leisure Service	42	7,980	40	6,986	35	5,007
Financial and Business Service	14	1,654	14	1,403	12	1,282
Vacant	29	3,939	26	3,930	35	6,810
Other Retail	0	0	0	0	0	0
Total	**209**	**43,599**	**202**	**41,621**	**202**	**41,788**

Source: GOAD Category Reports: 03/05/2018; 01/09/2021 and 02/10/2023

Change: 2018-2021	
Outlets (No.)	Floorspace (sqm)
-1	298
-3	-1,421
2	400
-2	-994
0	-251
-3	-9
0	0
-7	**-1,978**

Change: 2018 - 2023	
Outlets (No.)	Floorspace (sqm)
-2	-93
-6	-1,774
4	530
-7	-2,973
-2	-372
6	2,871
0	0
-7	**-1,812**

Change: 2021 - 2023	
Outlets (No.)	Floorspace (sqm)
-1	-390
-3	-353
2	130
-5	-1,979
-2	-121
9	2,880
0	0
0	**167**

17. In terms of national multiples, previous updates showed that the 2018 Goad survey recorded 46 national multiples in the centre whilst the 2021 survey recorded 42 national multiples. The latest Goad 2023 survey shows a marginal decline from 2021 to 41 outlets.

18. Compared to the current UK average, the mix of outlets by sector shows a higher proportion for convenience goods (14.4% compared with 9.3% nationally); comparison goods (27.2% compared with 26.4% nationally) and retail services (17.8% compared with 15.9% nationally). The proportion of vacant units is higher than the national average (17.3% compared with 14.1% nationally).

Table 6: Bilston: Outlets & Floorspace 2023

BILSTON	% of Total Outlets			% of Total Floorspace		
Category	**No. Outlets**	**%**	**UK Average**	**Floorspace Sqm**	**%**	**UK Average**
Convenience	29	14.36%	9.31%	14,707	35.19%	15.57%
Comparison	55	27.23%	26.40%	10,015	23.97%	29.42%
Retail Service	36	17.82%	15.90%	3,967	9.49%	7.31%
Leisure Service	35	17.33%	25.76%	5,007	11.98%	26.66%
Financial and Business Service	12	5.94%	8.33%	1,282	3.07%	6.25%
Vacant	35	17.33%	14.11%	6,810	16.30%	14.18%
Other Retail	0	0.00%	0.06%	0	0.00%	0.04%
Total	**202**	**100%**	**100%**	**41,788**	**100%**	**100%**

Source: GOAD Category Report 02/10/2023 and UK average as at 2024

19. In terms of floorspace, the data shows the convenience goods floorspace is more than double the national average (35.2% compared with 15.6% nationally) – attributable to the market, Lidl and large Morrisons store all within the Goad survey area. Retail services floorspace is also above the national average (9.5% compared with 7.3% nationally). Similarly the vacant floorspace is higher than the national average (16.3% compared with 14.2% nationally).

20. The floorspace figures also show that Bilston has a comparatively lower proportion of floorspace provision when compared nationally for: comparison goods, leisure and financial & business services.

21. The figure below shows distribution of town centre uses across the linear nature of Bilston town centre.

Figure 2: Bilston: Distribution of Town Centre Uses (2023)

Source: Goad Survey: October 2023

22. The distribution shows no significant changes when compared to past updates.

23. As with Wolverhampton City Centre, and as part of the **Wolverhampton Town Deal**, Bilston is also a recipient supporting the enhancement of Bilston Market including new flexible multi use events space, further consolidating the role of the market as a key driver of future economic prosperity in the town.

24. Furthermore, and as part of the **Bilston Health and Regeneration Programme,** the centre has received £20 million funding secured through Capital Regeneration Project grant. The programme of work is a transformational initiative to increase local prosperity, improve social mobility and bolster pride of place in Bilston Town Centre.

4. WEDNESFIELD TOWN CENTRE

25. The new category report for Wednesfield was based on a survey that was conducted in May 2024. This shows that since 2017, the centre has lost 3 outlets overall and just above the 2 outlets lost between 2021 and 2024. In terms of the changes to number of units by category type, in broad terms, there is marginal movement except for comparison goods which shows a loss of 6 units overall over the period 2017 to 2024.

Table 7: Wednesfield: Change in Number of Outlets & Floorspace 2017 - 2024

Category	2017		2021		2024	
	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
Convenience	12	2,016	11	1,756	15	2,360
Comparison	15	1,997	15	2,471	9	1,598
Retail Service	15	1,226	16	1,459	18	1,589
Leisure Service	13	1,997	15	1,997	13	1,774
Financial and Business Service	7	1,087	6	929	6	734
Vacant	11	1,236	9	753	9	1,096
Other Retail	0	0	0	0	0	0
Total	**73**	**9,560**	**72**	**9,365**	**70**	**9,151**

Source: GOAD Category Reports: 31/10/2017; 14/12/2021 and 14/05/2024

Change: 2017-2021		Change: 2017-2024		Change: 2021-2024	
Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)	Outlets (No.)	Floorspace (sqm)
-1	-260	3	344	4	604
0	474	-6	-399	-6	-873
1	233	3	362	2	130
2	0	0	-223	-2	-223
-1	-158	-1	-353	0	-195
-2	-483	-2	-139	0	343
0	0	0	0	0	0
-1	**-195**	**-3**	**-409**	**-2**	**-214**

26. In terms of national multiples, the number has been declining. In 2017 the Goad survey recorded 25 national multiples in the centre whilst the 2021 survey recorded 19 national multiples, and the latest (2024) survey 16 multiples.

27. Compared to the current UK average, the mix of outlets by sector shows that for comparison goods Wednesfield has almost half of the proportion when compared to the national average (12.9% compared with 26.4% nationally) and for leisure services it is again lower (18.6% compared with 25.8% nationally). In contrast the convenience goods outlets provision is more than double the national average

(21.4% compared with 9.3% nationally). Retail services are also higher (25.7% compared with 15.9% nationally) as is financial and business services provision (8.6% compared with 8.3% nationally). Vacant outlets represent 12.9% of the total which is lower than the national average of 14.1%.

Table 8: Wednesfield: Outlets & Floorspace 2024

WEDNESFIELD	% of Total Outlets			% of Total Floorspace		
Category	No. Outlets	%	UK Average	Floorspace Sqm	%	UK Average
Convenience	15	21.43%	9.31%	2,360	25.79%	15.57%
Comparison	9	12.86%	26.40%	1,598	17.46%	29.42%
Retail Service	18	25.71%	15.90%	1,589	17.36%	7.31%
Leisure Service	13	18.57%	25.76%	1,774	19.39%	26.66%
Financial and Business Service	6	8.57%	8.33%	734	8.02%	6.25%
Vacant	9	12.86%	14.11%	1,096	11.98%	14.18%
Other Retail	0	0.00%	0.06%	0	0.00%	0.04%
Total	**70**	**100%**	**100%**	**9,151**	**100%**	**100%**

28. In terms of floorspace provision, the data shows the same patterns as for outlets. There is a considerably higher proportion of convenience goods (25.8% compared with 15.6% nationally), retail services (17.4% compared with 7.3% nationally) and financial & business services floorspace (8% compared with 6.3% nationally). Similarly comparison goods and leisure services floorspace is lower than the national average (17.5% compared with 29.4% nationally). Vacant floorspace is also proportionately lower (12% compared with 14.2% nationally).

29. The figure below shows distribution of town centre uses across the linear nature of Wednesfield town centre.

Figure 3: Wednesfield: Distribution of Town Centre Uses (2024)

Source: GOAD Survey May 2024

30. The distribution shows no significant changes when compared to past updates.

31. As with Bilston town centre, and as part of the **Wolverhampton Town Deal**, Wednesfield is also a recipient supporting the improvement to Wednesfield High Street including environmental enhancements to the public realm and market. In addition, in March 2024, the Council concluded its public consultation on £3.3million improvements to transform **Wednesfield High Street**. The options considered included ways to increase the vibrancy of Wednesfield High Street by considering potential environmental enhancements to the public realm, shop fronts and the market to encourage increased footfall, linked trips and increased dwell time to support businesses.

5. POTENTIAL FOR RESIDENTIAL

32. The LSH Centres Study Addendum 2022 (paragraphs 2.38 - 2.45) provided estimates for potential for additional residential capacity in centres associated with the repurposing of existing vacant and under-utilised commercial floorspace, especially retail.

33. The Council has updated the figures based on the same methodology in the 2021 and 2022 studies informed by the new survey data.

34. The vacant floorspace total was used as a starting point, which was considered to be a realistic proxy for estimating the potential for surplus floorspace coming forward for residential use with the vacancy total adjusted to take account of:

- vacant units within centres but beyond the Goad boundaries / units where residential could not realistically come forward; and
- vacant floorspace that already contributed to housing figures, such as sites that could become future allocations and sites already identified for residential in the Strategic Housing Land Availability Assessments (SHLAAs).

35. The assumption that new residential development would be 3 storeys reflects the general physical form of Strategic Centres and with Permitted Development Rights allowing an increase of up to 3 storeys to the existing building. Adjustments were made to this assumption, where relevant, such as where more specific information about upper-storey potential was known and where upper storeys are already accounted for in the SHLAAs.

36. Further assumptions included assuming 25% of this remaining floorspace could come forward for residential and a deduction of 15% for communal circulation space. To this, an average apartment size of 65 sqm was applied (based on the English Household Survey (2018) and the 'Nationally Described Space Standards' (DCHLG, 2015)) which indicated a range between for 51-72 sqm for 1 and 2 bed apartments).

37. On this basis the Council has estimated the following as having a reasonable potential for residential, which is also set out in the Strategic Housing Land Availability Assessment (SHLAA):

- Wolverhampton City Centre - circa.209 residential units from the adjusted 22,571 gross sqm vacant floorspace;
- Bilston Town Centre - circa.35 residential units from the adjusted 4,320 gross sqm vacant floorspace;
- Wednesfield Town Centre - circa.9 residential units from the adjusted 1,080 gross sqm vacant floorspace.