

Nuneaton & Bedworth Borough Council TOWN CENTRES STUDY



ROGER TYM & PARTNERS
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Final Report
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1 INTRODUCTION

Study Scope & Purpose

- 1.1 Roger Tym & Partners is appointed by Nuneaton and Bedworth Borough Council to undertake a study of its town centres, and especially Nuneaton Town Centre, as the Borough's 'strategic centre'. The study aims to build on and update technical work undertaken by Roger Tym & Partners' (RTP) in assessing comparison goods retail needs of the 25 Strategic Centres in the West Midlands region, which formed part of the evidence base of the Phase Two revision of the emerging West Midlands Regional Spatial Strategy (WMRSS), published in December 2007.

Approach

- 1.2 The WMRSS (December 2007) identified Nuneaton as a 'Tier 4' strategic centre, with expenditure capacity to accommodate 25,000sq.m (gross) of additional comparison goods floorspace to 2021 and a further 10,000sq.m (gross) to 2026. A forecast of 30,000 sq.m of additional office floorspace was also identified.
- 1.3 The approach this study takes is to build on the overall forecasts identified in the WMRSS, and seeks to establish the performance of the town centres; assess what does and does not work well in Nuneaton and why; and identify the assets and opportunities that can be capitalised upon to improve performance and capture latent demand. This analysis will inform the development of a 'vision' for the centre, and objectives to deliver it, that will guide the subsequent formulation of development options to deliver the stated objectives. This study will form part of the Council's evidence base for its emerging Local Development Framework (LDF) and inform its Borough Plan and Nuneaton & Bedworth Town Centres Area Action Plan Development Plan Documents.
- 1.4 With this analysis in place, the study seeks to update the floorspace projections to reflect the implications of the much-changed economic context since the work on the WMRSS. This has been undertaken through a refreshed assessment of quantitative and qualitative need for comparison goods retail floorspace in Nuneaton, considered within the context of reduced forecasts of expenditure growth in the near-term, and changes to forecasts of floorspace efficiency and special forms of trading, as well as reviewing the potential development sites in the town centre, and assessing the current performance of Nuneaton against national benchmark indicators.
- 1.5 Building on this, the study seeks to identify how and where the projected additional development can be accommodated to deliver greatest beneficial impact and improved performance. To this end, a detailed assessment of the suitability, viability and availability of

- sites within or on the edge of Nuneaton town centre that may be capable of accommodating such development is also undertaken.
- 1.6 These sites will then be considered in developing options for the future regeneration of Nuneaton town centre that will be assessed against the agreed objectives on the basis of their effectiveness in delivering the objectives and outcomes sought; their efficiency in doing so (i.e. the balance between the cost and benefits of delivering the option relative to other options for achieving the same objectives/outcomes); and their value for money in terms of the cost per unit of output. This process will enable a preferred approach to accommodating the scale of development proposed to the greatest benefit of the town.
- 1.7 We also pay consideration to the role of Bedworth, as the Borough's second principal town centre, albeit one which serves a significantly more limited role than Nuneaton. This includes a full assessment of the vitality and viability of the town centre, its capacity to accommodate additional comparison goods floorspace, and an evaluation of potential development opportunities in the town centre.
- 1.8 It is considered that this approach is robust and will provide the Council with a sound component of the evidence base for its emerging Borough Plan and other development plan documents.
- 1.9 The report is based on extensive desk-based and on-foot assessments of the performance and key issues affecting Nuneaton and Bedworth town centres, and has been informed through extensive consultations with local stakeholders, including Borough and County Council officers, local commercial agents, property developers, and the town centres manager. Updated floorspace projections apply the most robust and up-to-date information available.
- 1.10 The study follows on from the Masterplan for Nuneaton and Bedworth town centres which was completed in November 2004 by Arup in conjunction with DTZ. The Masterplan established the physical framework for change in the two town centres, which is accordingly built upon in this study, although we note that relatively little development activity has taken place in the town centre subsequent to the publication of the Masterplan. The Masterplan sought to develop Nuneaton town centre as '*the main urban hub for the Borough*', and identifies five 'priority sites' in the town centre. For Bedworth, the Masterplan sought to '*celebrate and draw upon its wealth of community assets as an essential function of the town centre*', and identifies three 'priority projects' to stimulate development in the town centre.

Report Structure

- 1.11 In order to meet the report scope and purpose set out above, the remainder of the report is structured as follows:

- **Section 2** sets out a review of the quantitative capacity for additional comparison goods retail floorspace in Nuneaton and Bedworth town centres over the period to 2026, informed by RTP's update to capacity forecasts informing the West Midlands Regional Spatial Strategy;
- **Section 3** reviews the qualitative need for additional comparison goods retail provision in the centres of Nuneaton and Bedworth;
- **Section 4** presents an assessment of the performance of Nuneaton and Bedworth town centres, assessed against a range of 'performance analysis' criteria as identified in PPS4;
- **Section 5** considers the sites with development potential in Nuneaton and Bedworth town centres, setting out their key characteristics, suitability, viability and availability as well as our initial thoughts on potential uses for and prioritisation of the sites;
- **Section 6** then knits together the findings from the previous sections and sets out a vision for the future development of the two town centres;
- **Section 7** puts forward a spatial framework for the development of the town centres, by interpreting the visions and objectives in a spatial and geographical way to identify areas for different types of development; and
- **Section 8** summarises the findings of the study.

2 ASSESSMENTS OF QUANTITATIVE CAPACITY

Introduction

- 2.1 This section of the report outlines the changes to the comparison goods retail floorspace requirements for Nuneaton which were originally outlined as part of the evidence base for the Phase Two Revision of the emerging West Midlands Regional Spatial Strategy (WMRSS). RTP undertook the technical work in relation to assessing the comparison goods needs of the main centres in the West Midlands in November 2007; the Preferred Option for the Phase Two Revision was subsequently published in December 2007.
- 2.2 On 6 July 2010, the Secretary of State for Communities and Local Government announced the revocation of Regional Spatial Strategies (apart from the London Plan) with immediate effect. The implications of this decision are yet to be fully clarified and understood, although initial guidance has been issued to respond to any immediate matters that may arise. This programme returns decision-making powers on housing and planning to local councils. It has, however, raised concerns that it could exacerbate 'nimbyism' at the local level at a time when bold steps are needed. For the purposes of this study we have therefore drawn on the findings of RTP's 'West Midlands Regional Centres Study (WMRCS) - Further Update' (completed April 2009) in respect of the anticipated requirements for Nuneaton.
- 2.3 Having considered the requirements for Nuneaton, we progress to review the quantitative capacity for additional comparison goods retail floorspace in Bedworth town centre.

Nuneaton

- 2.4 Policy PA11 of the WMRSS Phase Two Revision (Preferred Options) confirms Nuneaton as one of 12 'Tier 4' centres¹ in the Region, part of a network of 25 town and city centres to be the focus of 'major retail developments' upwards of 10,000 sq.m gross and 'large scale office (class B1a) developments', upwards of 5,000 sq.m gross. Policy PA12A confirms that Nuneaton should plan for comparison goods retail floorspace in the region of 25,000 sq.m gross over the period 2006-21, and a further 10,000 sq.m gross between 2021 and 2026.

¹ We note the findings of the subsequent Panel Report into the Phase Two Revision (published September 2009) which proposed a revised three-tier structure, with Nuneaton one of 20 third-tier 'Other Strategic Sub-Regional Centres', however it is clear that the overall policy thrust remains unchanged.

- 2.5 The consultation process on the Preferred Option ended on 8 December 2008, and raised a number of matters to be discussed at examination in relation to strategic centres, including:
- Evidence to support the high levels of growth forecast in the period 2021-2026;
 - Whether the 'credit crunch' has any implications for comparison retail and office floorspace proposals outlined in the Preferred Option; and
 - The extent to which retail and office floorspace proposals for individual centres are sensitive to changes in the number and distribution of new housing allocations.
- 2.6 In order to be able to respond to these issues at the examination of the RSS, the West Midlands Regional Assembly (WMRA) appointed RTP in February 2009 to undertake a further review of the data supporting the forecasts for retail and office floorspace, to include revising the forecasts with the most up-to-date key assumptions underpinning the forecasts (such as per capita comparison expenditure forecasts, changes in floorspace efficiency, and growth of special forms of trading (e.g. online retail)); as well as how the new housing distribution proposed by the Government Office for the West Midlands (GOWM) in response to the Preferred Option. We draw on the findings of this study (completed April 2009) in respect of the anticipated requirements for Nuneaton.

Data input changes

- 2.7 As a result of changes in the UK economy since the publication of the November 2007 report, the two main providers of data on retail spending have published revised forecasts for growth in comparison goods spending per head in the period to 2016. The current range is from 1.3 per cent, per capita, per annum (Experian) to 2.31 per cent, per capita, per annum (MapInfo). For the purposes of the need forecasts set out below a 'medium' rate of 1.805 per cent - which represents the mid-point between the MapInfo and Experian forecasts - is used.
- 2.8 As neither forecast goes beyond 2016, for the WMRCS update we have applied judgement in establishing the most appropriate growth rates for the periods 2016-21 and 2021-26.
- 2.9 For the period 2016-21, we have taken the view that, given the conservative forecasts projected by both MapInfo and Experian for the 2008-16 period, and the fact that two years of low growth (during a recession) has historically been followed by a return to short, medium and long-term past trends, comparison goods growth in the period

2016-21 will be strong. We have therefore chosen to adopt for this period medium term past trend-based estimates, which for MapInfo is 5.6 per cent, per capita, per annum (MapInfo Information Brief 08/02), and for Experian is 6.1 per cent, per capita, per annum (Experian Retail Planner Briefing Note 6.1). The 'medium' rate of these forecasts is 5.85 per cent - which represents the mid-point between the MapInfo and Experian forecasts.

- 2.10 For the period 2021-26 it is considered more appropriate to be cautious, and therefore have used the ultra-long term past trends, which produces a comparison goods expenditure growth rates of 3.9 per cent, per capita, per annum (MapInfo) and 4.6 per cent, per capita, per annum (Experian). The 'medium' rate of these forecasts equates to 4.25 per cent.
- 2.11 A number of other changes in data assumptions which underpin the forecasts have also taken place since November 2007:
- i) the availability of the ONS 2006 - based sub-national population forecasts for Nuneaton & Bedworth Borough. These forecast an increase in the population of the Borough from 120,700 in 2006 to 127,000 in 2016; 130,800 in 2021 and 134,200 in 2026. There has been no further update to the RSS population forecasts, which were supplied to RTP by the WMRA for the purposes of the November 2007 update;
 - ii) the availability of new per capita expenditure data from MapInfo in relation to the 2006 base year; the first update being based on 2004 data in 2004 prices, but with this further update using 2006 data in 2006 prices;
 - iii) more recent information from Experian in relation to the projected future change in floorspace efficiency, as published in Retail Planner Briefing Note 6.1. This put forward a central case for change in comparison goods floorspace efficiency of 2.2 per cent, per annum over the period to 2016. However we are of the opinion that, in light of the low comparison goods expenditure forecasts projected by both MapInfo and Experian, as discussed above, a floorspace efficiency rate of 2.2 per cent, per annum cannot be supported. Therefore we have adopted a more conservative approach which ties the rate of floorspace efficiency change to the medium expenditure projections for the forecast periods used. This provides for a floorspace efficiency of 1.85 per cent, per annum between 2006 and 2008, reducing to 0.68 per cent, per annum between 2008 and 2016, subsequently improving to 2.2 per cent, per annum between 2016 and 2021, and finally reducing to 1.6 per cent, per annum between 2021 and 2026;

- iv) more recent information from Experian in relation to projected change in the proportion of comparison goods expenditure accounted for by Special Forms of Trading (SFT); and
 - v) the potential effects of changes in the quantum and distribution of new housing proposed by GOWM.
- 2.12 The figures set out below do not take into account existing commitments for retail development. However, we are not aware of any significant planning commitments for comparison retail floorspace in Nuneaton and Bedworth.
- 2.13 There are therefore two sets of control totals which can be used to guide comparison retail need for the Borough, the first using updated ONS 2006-based population projections and the amendments to the data inputs as described above, and the second using the unchanged RSS population forecasts and the amendments to the data inputs as described above.
- 2.14 Within both the ONS and RSS scenarios, the WMRCs provides for a minimum, mid-point and maximum sq.m floorspace requirement, based on policy options for distributing the regional-level floorspace requirements forecast in the study:
- The minimum floorspace requirements reflect RSS Growth Option 3 (medium expenditure growth rate, focus on Major Urban Area Centres) and Growth Option 10 (medium expenditure growth rate, focus on MUA Centres and Sub-Regional Foci Centres);
 - The maximum floorspace requirements reflect RSS Growth Option 7 (medium expenditure growth rate, and allowing for convergence of per capita expenditure of the Region's MUAs to reach 98 per cent of the national average by 2021, and 99 per cent of the national average by 2026);
 - The mid-point floorspace requirements reflect RSS Growth Option 6B (expenditure of the Region's MUAs to reach 98 per cent of the national average by 2021, and 99 per cent of the national average by 2026, but with a focus on the centres of Walsall, West Bromwich and Wolverhampton)

ONS-based comparison goods need forecast

Need to 2021

- 2.15 Table 2.1 below sets out the need arising in the period 2006-21 under the ONS model, and compares the overall quantum of floorspace with that identified in the November 2007 study:

Table 2.1 - ONS-based comparison goods need for Nuneaton to 2021

ONS-based minimum			ONS-based maximum			ONS-based mid-point		
<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>	<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>	<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>
<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>
15,000	20,000	-5,000	19,000	20,000	-1,000	17,000	20,000	-3,000

- 2.16 The overall requirement for Nuneaton to 2021 therefore is in the range 15,000 sq.m net sales area to 19,000 sq.m net sales area. This represents at the low end a significant reduction of approximately 25 per cent compared to that forecast in November 2007; however at the upper end there is relatively little reduction in the forecasts, decreasing from 20,000 sq.m net to 19,000 sq.m net. This is because the lower expenditure growth rates in the period up to 2016 are offset by (i) the higher growth rates associated with the updated 2006-based ONS population projections, and (ii) the period of higher per capita expenditure we have forecast between 2016 and 2021.

Need to 2026

- 2.17 Over the period to 2026 the floorspace requirements for Nuneaton remain largely unaltered from those identified in the November 2007 study. The exponential growth in expenditure in the period 2021-26 ensures that a further 10,000-11,000 sq.m net will be required over and above the requirement for 2006-21, generating a total requirement of between 25,000 sq.m net and 30,000 sq.m net. Thus the requirement for 2021-2026 is approximately half as much again as over the period 2006-21. However given the exponential impact of some of the key data inputs (e.g. comparison expenditure growth rates) it is considered that projections to 2026 should be treated with a degree of caution.
- 2.18 Table 2.2 below demonstrates the requirements for Nuneaton over the period 2006-26 based on ONS population forecasts.

Table 2.2 - ONS-based comparison goods need for Nuneaton to 2026

ONS-based minimum			ONS-based maximum			ONS-based mid-point		
<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>	<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>	<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>
<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>
25,000	25,000	0	30,000	30,000	0	28,000	28,500	-500

RSS-based comparison goods need forecast

Need to 2021

- 2.19 Using the RSS forecasts, which are based on unchanged assumptions in respect of population growth, but reflect all other amendments in respect of changes to data inputs noted above, a lower range of comparison floorspace requirements can be identified, of between 15,000 sq.m net and 16,000 sq.m net for the period 2006-21.

This represents a reduction in comparison goods floorspace need of between 20 and 25 per cent from the target of 20,000 sq.m net identified in the November 2007 study.

This is shown in Table 2.3 below.

Table 2.3 - RSS-based comparison goods need for Nuneaton to 2021

RSS-based minimum			RSS-based maximum			RSS-based mid-point		
<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>	<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>	<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>
<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>
15,000	20,000	-5,000	16,000	20,000	-4,000	15,000	20,000	-5,000

Need to 2026

- 2.20 Table 2.4 projects the RSS-based requirements over the period 2006-26. Again the power of exponential growth in expenditure can be seen: as was the case for the ONS-based assessment, the control total range for the RSS assessment, for the period 2006-26, is over half as much again as the control total range for the period 2006 to 2021. Table 3.4 shows that an additional 10,000 sq.m net of comparison goods retail floorspace is likely to be required over the period 2021-26, bringing the total requirement for 2006-26 to between 25,000 sq.m net and 30,000 sq.m net. It can be noted that the higher end scenario requirement is reduced from 30,000 sq.m net (in the November 2007 study) to 26,000 sq.m net, a reduction of 13 per cent.

Table 2.4 - RSS-based comparison goods need for Nuneaton to 2026

RSS-based minimum			RSS-based maximum			RSS-based mid-point		
<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>	<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>	<i>Revised forecast</i>	<i>2007 forecast</i>	<i>Difference</i>
<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>	<i>Sq.m net</i>
25,000	25,000	0	26,000	30,000	-4,000	25,000	27,500	-2,500

Conversion to gross floorspace requirements

- 2.21 The gross comparison retail floorspace requirement for Nuneaton set out in Policy PA12A of the WMRSS Phase Two Revision are based on the RSS ranges set out in Tables 4.3 and 4.4 of our November 2007 study, as reflected in Tables 3.3 and 3.4 above. However the figures are converted from net sales area (as outlined in the tables above) to gross floorspace using a ratio of 75 per cent, and rounded to the nearest 5,000sq.m. For consistency therefore the same approach has been applied to the figures set out in Tables 3.1 to 3.4, with the resulting gross floorspace requirements set out in Table 3.5 below.

Table 2.5 - Summary of ONS and RSS comparison goods need for 2021 and 2026, converted to gross sq.m

	Sq.m net requirement	Sq.m gross requirement	Rounded to nearest 5,000 sq.m	Change from 2007 forecast
ONS to 2021	15,000 - 19,000	18,750 - 23,750	20,000 - 25,000	-
ONS to 2026	25,000 - 30,000	31,250 - 37,500	30,000 - 35,000	-
RSS to 2021	15,000 - 16,000	18,750 - 20,000	20,000	-5,000
RSS to 2026	25,000 - 30,000	31,250 - 37,500	30,000 - 35,000	0

- 2.22 Therefore, over the period 2006-21, Nuneaton should plan for in the region of 20,000sq.m gross retail floorspace, with a high-end requirement of 25,000sq.m gross under the ONS scenario.
- 2.23 By 2026, the requirement for the whole plan period (i.e. 2006-26) increases to between 30,000 and 35,000 sq.m gross. Provision should therefore be made for between 10,000 and 15,000 sq.m additional comparison goods retail floorspace between 2021 and 2026, although as stated previously we consider these longer term forecasts should be treated with caution.

Bedworth

- 2.24 In this section we set out the quantitative need forecasts for Bedworth. We have adopted a different approach to assessing the levels of additional floorspace likely to be required for Bedworth than that utilised for Nuneaton, by virtue of the fact that Bedworth does not form one of the 25 Strategic Centres in the West Midlands, but rather fulfills a role more geared towards meeting local shopping needs. The emerging WMRSS notes the complementary role such centres such centres should play, including supporting growth where required. Accordingly, the centre cannot be considered suitable for large scale comparison shopping floorspace, as this would be paragraphs EC5.1 of PPS4, which states that local authorities should ensure:
- '...that the scale of the sites identified and the level of travel they generate, are in keeping with the role and function of the centre within the hierarchy of centres and the catchment served.'*
- 2.25 In the RTP West Midlands Regional Centres Study and subsequent update, it was assumed that 80 per cent of the overall floorspace requirement for the West Midlands would be directed towards the 25 Strategic Centres, with the remaining 20 per cent to support additional comparison goods floorspace in smaller centres across the region.
- 2.26 Given the nature of the retail hierarchy for Nuneaton & Bedworth Borough - i.e. one dominant strategic centre (Nuneaton), one smaller, district-level centre (Bedworth), and a small number of local-level centres (such as Bulkington), it is considered appropriate that the apportionment of retail floorspace need in the Borough follows

similar lines to the approach adopted by RTP across the wider West Midlands region; i.e. allocating the majority of the floorspace requirement to the main centre, and apportioning the remainder of the requirement between the smaller centres.

2.27 The assessment above identified the following indicative comparison goods floorspace requirements for Nuneaton town centre based on updated projections:

- **2006-2021:** approximately 20,000 sq.m gross
- **2021-2026:** between 10,000 and 15,000 sq.m gross
- **2006-2026:** between 30,000 and 35,000 sq.m gross

2.28 Therefore, if we consider that this represents 80 per cent of the Borough-wide requirement, this affords an additional comparison goods floorspace requirement to be met elsewhere in the Borough as follows:

- **2006-2021:** approximately 5,000 sq.m gross;
- **2021-2026:** between 2,500 and 3,750 sq.m gross;
- **2006-2026:** between 7,500 and 8,750 sq.m gross.

2.29 This equates to a net sales area requirement for the remaining centres in the Borough of between 5,600 and 6,600 sq.m over the period 2006-2026 (assuming a 75 per cent gross: net sales ratio). It can be expected that, as the second centre in the Borough in strategic terms, the majority of this should be directed towards Bedworth.

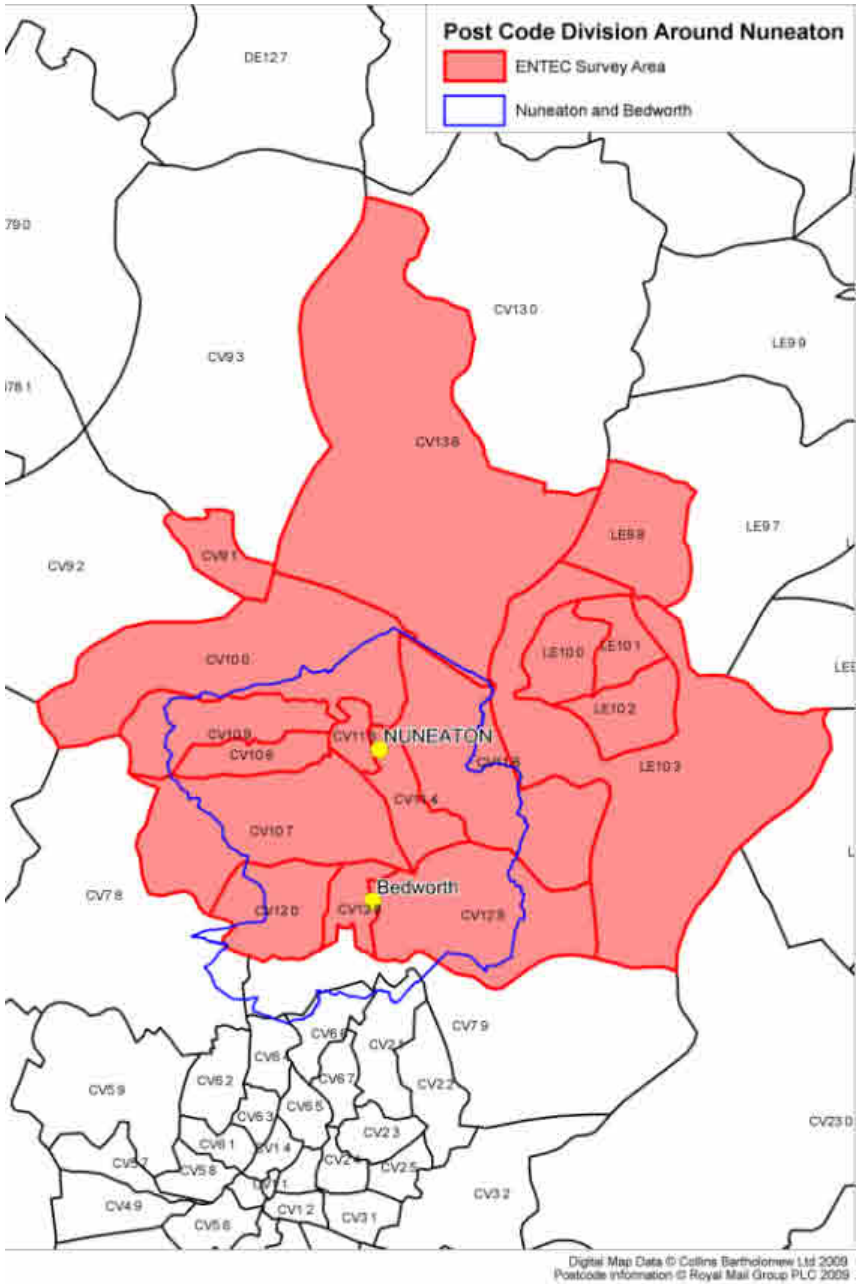
2.30 The household telephone survey undertaken in support of the ENTEC Baseline Study in 2007 indicates that Bedworth presently attracts an aggregate market share of 9.9 per cent from residents within Nuneaton and Bedworth Borough, based on the postcode sectors which predominantly fall within the administrative boundaries of the Borough (Figure 2.6)². The ENTEC study extended beyond the boundaries of Nuneaton & Bedworth to include parts of Hinckley & Bosworth Borough and Coventry; however the nature of the administrative boundaries and the results of the household survey indicate that Bedworth is likely to draw the majority of its trade from within the Borough. Bedworth does not attract a significant market share from any postcode sector beyond the administrative boundary of the Borough.

2.31 Bedworth draws reasonably strong representation from postcode sectors CV12 0 (26.1 per cent of respondents in this zone cited Bedworth as where most of their household's non-food shopping took place), CV12 8 (25.4 per cent) and most notably CV12 9 (33.8 per cent), and these can thus be considered the primary catchment area for the town.

² Postcode sectors CV10 7, CV10 8, CV10 9, CV11 4, CV11 5, CV11 6, CV12 0, CV12 8 and CV12 9.

Market shares from other parts of the Borough, particularly those to the west of the Borough which invariably look towards Nuneaton, are much weaker.

Figure 2.6 - postcode sectors in Nuneaton & Bedworth Borough



2.32 Therefore, if we apply Bedworth’s aggregate Borough-wide market share of 9.9 per cent to the requirements identified at paragraph 7.5 above, this generates an additional comparison goods floorspace requirement for Bedworth of approximately 2,500 sq.m gross between 2006 and 2021, and a further 1,250 to 1,850 sq.m gross between 2021 and 2026. This brings about a total floorspace requirement for Bedworth of between 3,750 and 4,350 sq.m gross between 2006 and 2026, equivalent to between 2,800 and 3,300 sq.m net sales floorspace (assuming a gross: net ratio of 75 per cent).

- 2.33 Bedworth thus accounts for just under half of the 20 per cent residual floorspace requirement for the Borough, leaving a similar level of floorspace available to support any small-scale proposals which may come forward in other centres in the Borough. Cases should be assessed on their individual merits and should be of a scale appropriate to the role and function of the centre.
- 2.34 The ENTEC household survey indicates that outflow of comparison goods expenditure takes place to a number of destinations beyond the boundaries of the survey catchment (shown in Figure 7.1), including Coventry, Leicester City Centre and Fosse Park, Leicester. This is to be expected given the higher order nature of Leicester and Coventry. We also expect noticeable flows of expenditure to be directed specifically towards the retail provision at the Ricoh Arena. There may be some limited scope for Bedworth to increase its aggregate market share above 9.9 per cent it currently attracts from the residents of the Borough, but given the presence of Nuneaton and Coventry in such close proximity any increase will be marginal, and dependent on securing a stronger range of comparison goods retailers than are currently present in the centre.
- 2.35 There are opportunities within Bedworth for the expansion of the retail offer to meet the identified floorspace requirement, although it is worth noting that of the three principal sites identified, only one - Site BW2 - is sufficiently closely related to the existing retail offer to attract any degree of footfall. It should also be remembered that the expanded Tesco store will include an enhanced range of comparison goods floorspace and this will account for a proportion of the identified requirement.
- 2.36 Therefore whilst there is likely to be a limited requirement for additional comparison goods floorspace in Bedworth town centre over the course of the Plan period it is considered that, at least in the short term, efforts are made to improve the existing retail stock in the town centre to improve its attractiveness and ability to be let, particularly given the current higher levels of vacancy.
- 2.37 In the longer term there may be limited scope for further development, of the nature developed successfully by means of the Aldi/Home Bargains development. However the geographical location of Bedworth means that, given its proximity to Nuneaton, there will inherently only be limited demand for representation in the centre, with most retailers unlikely to require representation in both Nuneaton and Bedworth. Clearly this will not alter during the Plan period, and Nuneaton should therefore remain the focus of additional comparison goods floorspace development, with Bedworth accommodating development of a scale appropriate to its role as a district-level centre (i.e. relatively limited). Thus, Bedworth should focus on improving the **quality** rather than quantity of

its retail offer, to move away from its value orientated offer which exists at present, alongside further enhancement of its leisure and cultural offer.

- 2.38 However the requirement identified above confirms that, should suitable opportunities for development in Bedworth (or indeed the smaller centres) arise, there is capacity to for the centre to accommodate the development without a negative impact on the existing retailers in the centre arising as a result. Proposals of this nature which come forward should be treated on their individual merits; however any additional retail floorspace should be well related to the existing retail core, and should be of a scale appropriate to Bedworth's role and function as a local centre.
- 2.39 We note that there is reasonable provision of office floorspace in the town centre at present, particularly in the Kings House development which is occupied by Warwickshire County Council, and that occupancy levels are good, with little vacant space presently available. Should vacant floorspace arise, this should be promoted in order to maintain footfall and thus the vitality and viability of existing retailers and businesses. However we do not consider that significant further office floorspace should be promoted in the town centre.
- 2.40 As we identify elsewhere in this report there is a relatively finite demand for office floorspace in the Borough at present, as witnessed by the lack of demand for premises in Nuneaton town centre, and ongoing vacant floorspace at new, purpose-built developments such as Bermuda. Therefore it is necessary to channel the relatively finite demand for office floorspace into one or more exemplar schemes in Nuneaton town centre, in order to encourage a self-supporting office market which will assist in improving the diversity of uses and overall performance of the town centre.
- 2.41 Clearly should proposals for office development in Bedworth come forward, these should be treated on their individual merits, as the further provision of such uses in the town centre would only serve to enhance its vitality and viability. However we consider that strategically a policy of concentrating new office development as part of quality, mixed-use schemes on the previously identified sites in Nuneaton town centre is the most robust approach. Whilst we have not undertaken quantitative assessments on the need for additional leisure floorspace in the town centre, but consider a policy of active promotion of existing facilities (such as the Civic Hall and Miners Welfare Park), coupled with the provision of a broader range of complementary facilities (such as restaurants/bars and café's) will assist in attracting more visitors to the centre, and, crucially, encouraging 'dwell time' in the town centre.

Implications of New Developments

- 2.42 RTP undertook a search for recent and proposed retail developments of a scale and nature likely to impact on the capacity for additional floorspace for retail and other town centre uses in Nuneaton and Bedworth. Only one proposal was found, namely the proposals to redevelop Coventry City Centre in line with an emerging masterplan. Initial information suggests that this proposal could provide up to 2.2million sq. ft (23,681sq. m) of retail space, although it is unclear as to what proportion of this space is net additional. New office space, public buildings and public realm are also proposed.
- 2.43 However, these proposals are at a very early stage. Masterplanning of the site is still ongoing, and it is likely that the Council will have to acquire land in order to deliver the scheme. This can be a very long and drawn out process and, at the current time, the market values of the developments proposed in Coventry are too low to provide a real driving force behind delivering the scheme in the short to medium term. It is also likely that the amount of floorspace and the mix of uses will change significantly from the current proposals, in order to reflect evolving market conditions.
- 2.44 In view of the above, we consider that it is not possible to properly assess the implications of this proposal at this time, given the very limited information available on the development and the timescales for its delivery. Nonetheless, the Council should monitor the progress of this scheme, as it does have the potential to draw trade away from Nuneaton, in particular. It should seek to ensure that the development is appropriate in scale to a city the size of Coventry and does not unduly affect competing centres in the local retail hierarchy.

3 ASSESSMENT OF QUALITATIVE NEED

Introduction

- 3.1 In the previous section we have outlined the quantitative requirement for additional comparison goods retail floorspace in Nuneaton, revised to take into account of recent projections in respect of expenditure growth, special forms of trading and such, as well as considering the quantitative requirement for additional floorspace in Bedworth.
- 3.2 However, PPS4 states that qualitative need should also be taken into consideration when preparing development plan documents. Therefore we set out below the qualitative need for additional retail provision in Nuneaton and Bedworth.

Nuneaton

Presence of national retailers

- 3.3 We have undertaken a benchmarking exercise with eight other centres which can be considered comparable to Nuneaton in terms of their placing in the retail rankings and demographic composition. The comparator centres include locations such as Stevenage, Sunderland and Bradford, as well as centres more local to Nuneaton such as Loughborough, Stafford, Tamworth and Walsall, the latter three of which are identified as 'Tier 4' centres in the WMRSS, as is Nuneaton.
- 3.4 The exercise takes a 'basket' of fifty main national 'High Street' retailers, which can be considered the principal drivers of footfall within a town centre, and compares representation in each of the nine centres (including Nuneaton). The assessment concentrates on mainstream, rather than overly high-end retailers which would not be expected to locate in centres the size of the identified 'Tier 4' centres or equivalent (except, for example, in a centre such as Stratford-upon-Avon which trades above its weight due to its tourism draw).
- 3.5 Figure 3.1 summarises the location grade of each comparator centre and its corresponding position in the most recent (2008) Management Horizons Europe *UK Shopping Index*. This database ranks the performance of all the principal centres in the UK and can therefore be considered a robust benchmark of the retail strength of individual centres vis-à-vis one another. It also shows the 'market position' of each centre, which reflects the quality of the retail offer in each respective centre. It can be seen that whilst Nuneaton has made demonstrable improvement in its placing in the national retail rankings, the eight other benchmark centres have lost ground. This shows the positive effect the opening of the Ropewalk Centre had on improving Nuneaton's retail offer and placing in the retail hierarchy.

3.6 The results of the benchmarking exercise are shown in Figure 3.2 below. It can be noted that Nuneaton scores the highest of nine comparator centres, with 42 out of the basket of 50 retailers currently trading in the town (a rate of 84 per cent). This can be considered a strong performance and an endorsement of the quality of the retail offer which Nuneaton presently has - particularly since the opening of the Ropewalk. Those currently absent from the town's retailer offer are fashion chains Bank, M&Co and USC, Currys Digital, JD Sports, cosmetics retailer Lush, Primark and Marks and Spencer following its recent closure. The next highest-scoring centres in terms of multiple retailer representation are Sunderland and Stafford (both 37 out of 50) followed by Bradford and Walsall (both 36 out of 50). By contrast Stevenage and Tamworth both score just 30 out 50 (60 per cent).

Figure 3.1 - comparator centres for Nuneaton and their position in the MHE UK Shopping Index

Centre	MHE Location grade (2008)	MHE market position (2008)	MHE centre rank (2008)	MHE centre rank (2003/04)	Change in rank 2003/04-2008
Nuneaton	Regional	Middle	103=	138	+35
Stevenage	Regional	Middle	103=	98=	-5
Sunderland	Regional	Middle	107	72	-35
Bradford	Regional	Middle	113	89=	-24
Loughborough	Sub-Regional	Middle	147=	180=	+33
Mansfield	Sub-Regional	Middle	128=	105=	-23
Stafford	Sub-Regional	Middle	139	115=	-24
Walsall	Regional	Middle	99=	82	-17
Tamworth	Major District	Middle	267=	236=	-31

Figure 3.2 - benchmarking exercise of major High Street retailers in selected West Midlands 'Tier 4' centres and other national comparable centres³

	Stevenage	Sunderland	Bradford	Loughborough	Mansfield	Walsall	Stafford	Tamworth	Nuneaton
Argos	0	1	1	1	1	1	1	1	1
Bank Fashion	0	0	1	0	0	1	0	0	0
Body Shop, The	1	1	1	1	1	1	1	1	1
Boots the Chemist	1	1	1	1	1	1	1	1	1
Burton	1	1	1	1	1	0	1	1	1
Carphone Warehouse	1	0	1	1	1	1	1	1	1
Claire's Accessories	1	1	0	1	1	1	1	1	1
Clarks	1	1	1	1	1	1	1	1	1
Clinton Cards	1	0	0	1	1	1	1	1	1
Currys.Digital	0	1	1	1	1	0	0	0	0
Dorothy Perkins	1	0	1	1	1	1	1	1	1
Early Learning Centre	0	1	1	0	1	1	1	1	1
Evans	1	1	1	1	1	0	1	1	1
F Hinds	1	0	1	0	1	0	0	0	1
Game	1	1	1	1	1	1	1	1	1
Gamestation	1	1	1	0	1	1	1	1	1
H&M	0	1	0	0	0	0	0	0	1
H Samuel	1	1	1	1	1	1	1	1	1
Holland and Barrett	1	1	1	1	1	1	1	1	1
HMV	1	1	1	0	1	1	1	1	1
JD Sports	1	1	1	1	1	1	1	0	0
Jessops	0	1	1	1	0	1	1	1	1
JJB Sports	1	1	1	1	1	1	1	0	1
Lush	0	0	0	0	0	0	0	0	0
M&Co/ Mackays	0	0	0	0	0	0	0	0	0
Marks & Spencer	1	1	1	1	1	1	1	1	0
Millets	0	0	1	1	0	1	1	0	1
Monsoon	0	1	0	0	0	0	1	0	1
New Look	1	1	1	1	1	1	1	1	1
Next	1	1	1	1	1	1	1	0	1
Republic	0	1	0	0	0	1	0	0	1
Peacocks Stores Ltd	0	1	1	1	1	1	0	0	1
Phones 4U	1	1	1	0	1	1	1	1	1
Primark	1	1	1	1	1	0	0	0	0
River Island	0	0	1	0	0	1	1	0	1
Ryman	1	1	0	1	1	1	1	1	1
Savers Health & Beauty	1	1	0	1	1	1	1	1	1
Schuh	0	0	0	0	0	0	0	0	1
Shoe Zone	1	1	0	1	0	1	1	1	1
Specsavers Opticians	1	1	1	1	1	1	1	1	1
Sports Direct / Gilesports	0	0	0	1	0	0	1	1	1
Superdrug	0	1	1	1	1	1	1	1	1
Thorntons	1	1	1	1	1	1	0	1	1
Topshop	0	1	0	1	1	1	1	0	1
TJ Hughes	0	0	1	0	0	0	0	0	1
TK Maxx	1	1	1	1	1	1	1	1	1
USC	0	0	0	0	0	0	0	0	0
Waterstone's	1	1	1	1	0	0	1	0	1
WH Smith	1	1	1	1	1	1	1	1	1
Wilkinson	0	1	1	0	0	1	1	1	1
Total	30	37	36	34	34	36	37	30	42

³ Excludes out-of-centre retail parks. Based on retailer websites and yell.com searches, July 2009.

The quality of the retail offer

- 3.7 Nuneaton has a solid range of lower-middle retailers (e.g. Peacocks, New Look), middle-order retailers (Next, River Island) and a small number of upper-middle ranking retailers such as Monsoon. As noted above, the commencement of trading of the Ropewalk centre has successfully attracted many new middle-market brands to Nuneaton, including stores such as H&M, Republic and Topshop which have limited representation in the comparator centres. The addition of such retailers to the offer of Nuneaton is a fillip for the attractiveness of the centre as a shopping destination.
- 3.8 Outside of the Ropewalk, it is apparent that much of the retail offer in the town is geared towards the value end of the market, reflecting in part the local demographic composition, and in part the gravitation of higher-end retailers towards larger centres such as Birmingham, Leicester and Solihull. Value retailers are generally not key attractors for a centre (with the notable exception being Primark, which is currently absent from the retail offer in Nuneaton); therefore there is a demonstrable need for Nuneaton to further diversify and improve the quality of its retail offer to enhance the higher-end offer which currently exists in the Ropewalk. Vacant units remain in the Ropewalk Centre which are likely to satisfy the operational requirements of many such operators; although as we have noted at present there appears to be something of a mis-match between the nature of the extant requirements (which are largely from value-end retailers) and the availability of premises (largely in the Ropewalk, where rental rates are likely to be too high to appeal to value retailers). It can be expected that, as the economic situation shows signs of improvement, a more balanced retailer requirement profile may again emerge.
- 3.9 The qualitative improvement to the town's retail offer delivered by Ropewalk is evident in the improvement in Nuneaton's position in Management Horizon Europe's *UK Retail Rankings*, in which Nuneaton improved from 138th (2003/04) to 103rd (2008). The Index is largely calculated on the range and quality of multiple retailer representation in a centre. However the challenge now is for Nuneaton to consolidate and further improve this position in the face of competition from competing centres. Further up-scaling of the retail offer will be needed in order to achieve this. Effective utilisation of the vacant premises in the Ropewalk, and the modernisation (and where appropriate, amalgamation in order to create larger units) in the rest of the primary retail area will assist in this respect.
- 3.10 At present, for the most part the retail offer in Nuneaton (with the exception of some of the stronger tenants in the Ropewalk) is mainstreamed to the extent that there is little to distinguish between the retail offer of nearby centres such as Hinckley, Rugby and

Coventry. Whilst this remains the case, there will only be limited potential for Nuneaton to increase its draw as a retail destination beyond its immediate hinterland, within which there is existing strong competition for spending, although the role of the town's market in drawing trade from a wider area is well documented and acknowledged. Therefore it is also important that provision is made for smaller, independent retailers to form key component of the retail activity in the centre. The existing independent retail sector in Nuneaton is well established, however it too needs improving to offer a more 'boutique'/niche shopping experience which will again assist in improving the appeal of the town from a broader geographical area.

The quality of the office offer

- 3.11 A review of all available office accommodation in Nuneaton town centre has revealed that the quality of space currently available is generally poor. Much of the existing stock is comprises 'above the shop' type space, which in many cases was not originally designed for office use. Even where refurbished, this kind of space does not, and is not likely to, meet the requirements of many modern businesses. In particular, perimeter trunking of power and IT cables, rather than raised floors, is not ideal and presents a constraint to businesses. As such, the rental values being sought are generally quite low (less than £12 per sq. ft), although the quoting rent for some space on Newdegate Street that is available on very flexible terms is £15 per sq. ft). This space, like the majority of that available in the centre was developed in the 1960s and now looks tired and out of date and may not present a suitable image for companies seeking to locate in the town.
- 3.12 In addition to the above the shop type space, there is also one large purpose built office development, again constructed in the 1960s. Mill House is located adjacent to the River Anker and the park and is accessed off Mill Street. Three of its' four storeys are currently occupied, primarily by the Job Centre, although the third floor, comprising nearly 7,000sq. ft is available to let. Its location and setting would ordinarily be attractive to business. However, the quality and design of the building appears to deter potential tenants from the remaining space.
- There is no modern purpose built office accommodation in the town centre.

The quality of the leisure offer

- 3.13 There is also a clear qualitative need for improvements to the A3 restaurant and wine-bar offer in the town centre, which is currently limited to pubs and nightclubs, with little in the way of restaurants. Providing the opportunity for a concentration of such uses in an attractive setting will enable improvements to be made in this respect. The

realisation of the redevelopment of the bus station site forms an important component in this respect.

- 3.14 As noted above, there are clear gaps in other leisure sectors in the town centre, with major hotel and cinema facilities located in locations on the outskirts of the urban area such as Bermuda, which has seen the development of an Odeon multiplex and adjoining restaurant and hotel facilities. The absence of such facilities ensures that footfall in the town centre in the early evening period is highly limited. We acknowledge there is likely to be unlikely to be sufficient requirement for a second cinema in the town centre, but consider the introduction of a hotel in conjunction with an improved restaurant offer will assist in delivering significant qualitative improvement to the town centre leisure offer.
- 3.15 The presence of Riversley Park close to the town centre is a fillip, but clearly has limited capacity outside of daylight hours.

Bedworth

- 3.16 Bedworth is ranked in equal 612th position⁴ in the 2008 MHE *UK Shopping Index*, Centres which are similarly ranked to Bedworth and which can be considered to share similar characteristics (i.e. proximity to a major urban area / shopping centre) include Hillsborough (Sheffield), Alfreton (Derbyshire), Kingswood (Bristol) and Hucknall (Nottingham). The MHE Index is a useful benchmarking tool in assessing the quality of the retail offer in these centres which we consider more worthwhile than repeating the multiple retailer representation benchmarking (undertaken for Nuneaton above), as the lower order nature of these centres ensures all are likely to have limited multiple retail representation.

⁴ Other centres ranked equal 612th in the 2008 MHE Index are: Alfreton; Altrincham - Broadheath; Edinburgh - Cameron Toll Centre; Edinburgh - Murrayfield; Fort William; Fraserburgh; Frome; Glasgow - Shawlands; Hull - St Andrew's Quay Retail Park; Lurgan; Minehead; Sheffield - Drakehouse Retail Park; Sheffield - Hillsborough; Stansted Airport; Telford - Wellington and Winsford.

Figure 3.3 - Quality of retail offer in Bedworth and comparator centres

Centre	MHE 2008 Rank	Quality of retail offer								
		Market position	Luxury %	Upper %	Upper Middle %	Middle %	Lower Middle %	Value %	Not classified %	Fashion market position
Bedworth	612	Lower	0.0	0.0	0.0	28.6	19.6	10.7	41.1	Lower
Alfreton	612	Middle	0.0	0.0	0.0	35.7	14.3	16.1	33.9	Value
Sheffield – Hillsboro'	612	Middle	0.0	0.0	0.0	32.1	12.5	17.9	37.5	Lower
Telford – Wellington	612	Middle	0.0	0.0	0.0	35.7	19.6	14.3	30.4	Lower
Bristol – Kingswood	629	Middle	0.0	0.0	0.0	41.8	29.1	7.3	21.8	Lower
Hucknall	629	Middle	0.0	0.0	0.0	43.6	14.5	16.4	25.5	Value

- 3.17 Figure 3.3 indicates that neither Bedworth nor any of the comparator centres offer any representation of retailers in the 'luxury', 'upper' or 'upper-middle' categories, which largely explains their similar positioning in the Index. However it can be seen that Bedworth is the only one of the six centres to have a 'lower' market position, reflecting the fact that only 28.6 per cent of the retail offer in the centre falls within the middle-market category, compared to upwards of 40 per cent in centres such as Kingswood and Hucknall.
- 3.18 19.6 per cent of the retailers in Bedworth fall within the 'lower-middle' category, the joint second-highest of all the comparator centres (alongside Wellington), but lower than Kingswood (29.1 per cent). A further 10.7 per cent of retailers fall within the 'value' category, but conversely this figure is amongst the lowest of all the comparator centres. Over 40 per cent of the retailers in Bedworth are 'not classified', and are thus unclassifiable service-type uses which cannot be graded on quality (such as banks). These retailers are unlikely to be significant drivers of footfall in a centre and less likely to attract people from beyond a local catchment, but do play an important role in meeting local day-to-day needs.
- 3.19 Bedworth's fashion market position - which concentrates solely on the quality of the clothing retailers in the town centre, as these are principal generators of pedestrian activity, falls within the 'lower' category, which reflects the lower-order nature of the centre, and the fact that many fashion retailers concentrate their activities in higher order centres such as Nuneaton and Coventry. There is therefore inherently limited scope for Bedworth to realistically upscale its retail offer given its role and function as a

centre for meeting local needs, however a realistic achievement should be to improve representation from middle (and possibly limited upper-middle) retailers to move away from the value-end orientation of the current retail offer.

- 3.20 An improvement in the breadth of the retail offer will assist in improving footfall in the town centre in those areas which are largely given over to comparison goods retailing (chiefly All Saints Square) thus improving the vitality and viability of the centre as a whole, and encouraging visitors to the centre to undertake 'linked trips' shopping.
- 3.21 The leisure offer in Bedworth is reasonably strong in Bedworth, particularly when the size of the centre is borne in mind. The Civic Hall is clearly a huge fillip, and the presence of other assets within and adjacent to the town centre such as the library and Miners Welfare Park are clearly positive. However the shortfall in the qualitative offer in respect of leisure facilities is the lack of presence of facilities in the town centre which encourage 'dwell time', both during and after retail trading hours - there is a demonstrable shortfall in the provision of cafés and restaurants in the town centre. We discuss this issue further in our performance analysis of the town centre in the following section. Evidence from local stakeholders also suggests a decline in the number of public houses in recent years. A need exists therefore to again improve the quality of the leisure and food & drink offer away from take-aways towards better facilities which encourage visitors to stay longer and spend more in the town centre.

4 PERFORMANCE ANALYSIS OF NUNEATON AND BEDWORTH TOWN CENTRES

Introduction

- 4.1 This section of the report sets out our assessment of the current performance of Nuneaton and Bedworth town centres. It sets out current performance characteristics against a number of criteria that measure town centre vitality and viability, relying on published data and making comparisons over time and with comparable centres where possible. It goes on to apply this information to the findings of an extensive consultation exercise undertaken with key stakeholders in the future regeneration and development of Nuneaton and Bedworth. These include shopping centre owners, property agents and developers, various local authority officers and other regeneration practitioners. The synthesis of this information is critical to answering several key questions that will lead to the identification of a future strategy for the centre. This, in turn, will help to identify how best and where best to accommodate future development across a range of uses.
- 4.2 Having reviewed the benchmark indicators of the performance of the centres, the section considers those aspects of each centre that currently work well, and those which do not. We also provide a review of the assets and opportunities that can be brought to bear to drive improved performance.

Nuneaton

Prime retail rents

- 4.3 Between 1999 and 2005 prime 'zone A' rents remained static at approximately £70psf. In 2006, however, there was a large jump up to £120psf (source: Colliers CRE for Focus and EGi), although local agents suggest slightly lower prime rents at £110psf. This coincided with the opening of the Ropewalk Shopping Centre, which brought new high quality retail floorspace to the market, created new headline rental levels for the town and became the new 'prime' retail pitch. Since that time, headline rental values have remained the same and some space at Ropewalk remains to be taken up.
- 4.4 Elsewhere in the town, local agents suggest Zone A rental levels in the region of £90-£100psf in the Market Place area and £25-£35psf in more secondary locations⁵.

⁵ Information sourced from stakeholder consultations, summer 2009

Retail yields

- 4.5 Retail yields are a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres. It is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as percentage of the capital value. The level of yield broadly represents the market's evaluation of the risk and returned attached to the income stream of shop rents. A lower yield reflects greater market confidence in a centre.
- 4.6 The Valuation Office's 'Property Market Report' of July 2008 identified current retail yields in Nuneaton of 6.25 per cent. This compares moderately to the other 'Tier 4' towns in the West Midlands, with four showing lower yields and four higher. As might be expected in the current economic climate, Nuneaton's retail yield has increased over the last twelve months. However, the 0.5 per cent increase seen in Nuneaton is at the top of the range of those experienced by the other Tier 4 towns in the West Midlands. That said, as with rental levels, the opening of the Ropewalk had a significant impact, resulting in yields falling from 6.5 per cent in 2005 to 5.75 per cent by 2007.

Retail representation

- 4.7 In Section 3 we have presented an analysis of multiple retailer representation in Nuneaton, and the benchmarking exercise indicated that Nuneaton scores positively in this respect. Whilst this level of representation of major multiple retailers is good for a town of Nuneaton's size, it is understood that it has remained static for several years, since the opening of Ropewalk, with retailers who have improved their representation in the town replaced in their former units by services uses such as banks. Nuneaton currently accommodates 26 of Experian Goad's 31 'Major Retailers'.
- 4.8 National multiples are not the only factor in considering the quality of retail representation. Clearly, a high quality centre would have a broad qualitative range of retailers. The 'Qualitative Review of Centres' undertaken as part of the West Midlands Regional Centres Study in 2006 found that Nuneaton had just 2 of RTP's basket of 97 'high profile retailers'. Whilst this is broadly in line with provision in other comparable towns, there is clearly scope for improvement. As noted previously, it is also important for a centre to have a stock of independent retailers to give it uniqueness, sense of variety and place and a competitive advantage over rivals.
- 4.9 This issue has also been identified by several consultees, who identify the fact that the quality of retailers in the centre is not as good as it might be and suggest that this is due to the socio-economic profile of the area and the presence of competing centres.

Retail requirements

- 4.10 The Focus commercial property database includes details of active requirements for all the principal retail centres in the UK, enabling analysis of the number and nature of retailer requirements for a given centre. At the time of the West Midlands Regional Centres Study in 2006 (data from 2005), Nuneaton had 32 retailer requirements - the lowest of the 'Tier 4' towns in the region which suggests comparatively low levels of demand. Since that time the number of requirements has dropped to 24 in April 2009, principally as a result of requirements being accommodated within Ropewalk. However, it is important to note that this level of requirements has held firm over the last 12 months, despite the economically challenging climate. Simply by retaining the same level number of requirements, Nuneaton has risen in Focus's ranking of centres by requirements from 377th in October 2007 to 146th in January 2009. That said, it may be that many other centres have had significant volumes of retail floorspace coming 'on-stream' over this period that has accommodated many requirements.
- 4.11 It is also important to analyse qualitative aspects of the requirements. The vast majority of the requirements are seeking prime space in the town centre. However, four of the current 'live' requirements are from charity shops and two are discount retailers. That said, several high order operators also have requirements including Pizza Express, Laura Ashley and Finesse jewellers. We also note the recent openings of Caffè Nero and department store operator TJ Hughes in the town.
- 4.12 It should be noted that the fact that there remains some vacant space in Ropewalk and also a significant number of requirements suggests that the space that is currently available is, perhaps, not of the size, nature or location sought. As such, there appears to be an opportunity for new development to capitalise on this unmet demand.

Vacancy rates

- 4.13 The Experian Goad Category report, based on a survey in September 2008, identifies the vacancy rate at 8.4 per cent of units (33 in total) and 7.2 per cent of floorspace (87,000sq. ft). This compares with national averages of 10.3 per cent of units and 8.5 per cent of floorspace and as such, suggests relative health of Nuneaton. The fact the vacant floorspace percentage is lower than the percentage of units, shows that, on average, the vacant units are generally smaller than the average for the town as a whole. The vacancy rates are less than the figures above at present with improvements still on business lettings still on retail properties.
- 4.14 Since the West Midlands Regional Centres Study of 2006, the proportion of vacant units has reduced by 1.1 per cent from 9.5 per cent. This improvement also suggests a beneficial trajectory in terms of vacancies, although it should be noted that in 2006

Nuneaton had the third highest vacancy rate of the 9 Tier 4 centres in the West Midlands and that some increase in vacancy rates can be expected since the survey in September 2009 and over the current recession (although this is likely to affect all centres to some extent).

- 4.15 We are aware that many of the vacant units in Ropewalk are long-standing, rather than arising as a result of the current economic downturn. We note that a number of these units have recently been occupied or are under offer, and this can be seen to be encouraging within the current economic context. The occupation of the former Woolworths unit by TJ Hughes is a particular success. Priority should be given to securing the occupation of the remaining vacant units.

Diversity of uses

- 4.16 The Experian Goad Category Report (September 2008) shows that Nuneaton has an above average proportion of units and floorspace used for comparison retailing. Sub-sectors of particular strength include gardens & equipment, vehicle accessories and office supplies amongst others. However, this hides some weaknesses in the comparison offer, in particular for 'antiques'; 'art & art dealers'; 'crafts, gifts, china & glass', 'second hand goods' and 'travel and leather' sub-categories⁶. These types of retailer are more likely to be local independent traders and the under-representation of them suggests a potential lack of character and uniqueness in the town's retail offer. Whilst this is to an extent offset by the broad range of goods sold at the town's market, this should not be considered a substitute, particularly given the market is only held twice-weekly, and the attraction of a broader range of niche/unique retailers should be aspired to.
- 4.17 Representation of convenience stores and retail services is broadly in line with national averages. However, leisure services are significantly under-represented in the town. They comprise 17.3 per cent of units and 13.8 per cent of floorspace relative to national averages of 21.4 per cent and 22.7 per cent. Particular under-provision can be seen in respect of the 'restaurants, bars & wine bars, café's and public houses' sub-sector. Qualitative assessment of the range of facilities in the town centre suggests that within this sub-sector, the shortfall is particularly prevalent in both restaurants and higher-end bars and wine bars (although public houses are reasonably represented). It should also be noted that the centre does not currently include a cinema, with the

⁶ It should be noted that the Experian Goad survey of the town centre does not necessarily correlate with the Local Plan-defined town centre boundary and therefore slight differences in the assessment of diversity of the retail offer may arise as a result.

town's main provision in this respect at the out-of-centre Bermuda Park development. Conversely provision of nightclubs is above that which might be expected.

- 4.18 Similarly the town centre does not contain any major hotels, which also serves to restrict the evening economy of the town centre. The Premier Inn hotel at Bermuda takes advantages of the strong proximity of the location to the national road network, whilst there are Travelodge hotels located out-of-centre on the A47 and A444, as well as a Days Inn hotel also on the A444. The hotels all cater towards the budget end of the market.

What works well and why

- 4.19 Nuneaton's markets were identified by a number of consultees as a key strength of the town. Markets are held on Wednesdays and Saturday in the main pedestrianised areas, and have been noted to attract visitors from a wider area than the 'natural' catchment of Nuneaton extends to. The markets work well for Nuneaton for several reasons. They further diversify and add interest and variety to the retail offer. Partly as a result of this, they drive significantly increased footfall that not only benefits stallholders, but all the other shops in the town also. The management of the Ropewalk reports significantly increased footfall and improved trading on market days.
- 4.20 The Ropewalk Shopping Centre has proved relatively popular with national multiple retailers and has served to satisfy much of the unmet demand identified at the time of the West Midlands Regional Centres Study in 2005/6 and to demonstrate that there is demand that can be profitably realised within Nuneaton town centre. The tenant mix in the centre can be considered reasonably strong. The remaining space in the centre is likely to absorb further demand of this nature. However, this type of space does not meet the requirements of all retailers and service operators and potential remains for higher quality development to attract higher order retailers and local independent traders. These businesses often seek 'character' accommodation in attractive landscaped environments. Furthermore many of the vacant units in the Ropewalk have been vacant since the opening of the centre, suggesting reluctance amongst retailers to commit to the centre, although we note a recent increase in the number of units being successfully let.
- 4.21 Nuneaton's location and transport networks also make it a potentially attractive place to do business. In particular, the train station provides regular and good quality services to a number of key locations and the proximity of the town to the motorway network further enhances accessibility. Whilst the ring road can suffer congestion at times and in certain locations, it does provide relatively efficient access into and around the centre. Ordinarily, these kinds of factors would be expected to trigger

demand for town centre business accommodation, given that such businesses would have access to a large pool of labour. However, Nuneaton town centre has not generally been able to supply the premises in which to accommodate them, and business accommodation has instead gravitated towards out-of-centre developments such as Elliot Park.

What does not work well and why

- 4.22 The office market in Nuneaton is currently extremely limited. Office uses are principally confined, at present, to public sector buildings and small 'above the shop' type spaces. The West Midlands Regional Centres Study assessed Nuneaton to have c41,000sq. m of built office stock - the second lowest of the 'Tier 4' towns. No significant office development has occurred within the town centre since that time. This minimal level of provision is likely to be a function of the fact that Nuneaton has the lowest number of people employed in the financial and business services sector of all the towns considered as part of the West Midlands Regional Centres Study. Clearly the minimal amount of office floorspace in the town centre has significant implications for the demand for related services and facilities such as sandwich shops, cafés and restaurants, health & fitness centres and the like.
- 4.23 Prime office rental values in the town are around the regional average at £14psf and yields are below average at 6.4 per cent, although this relate to the somewhat stronger out of town market. Within the town centre, headline rents are around £10-£11psf although more typically are in the £6-£8psf range, reflecting the quality of space available.
- 4.24 It should be noted that almost all recent office development in the wider Nuneaton area has been out of town (at purpose-built developments such as Bermuda and Elliot Park) and that this has served to draw away from the town centre the limited demand that has been in the market. The identification and marketing of easily developable sites for office uses within the town centre, allied to constraints on further out of town office development, would greatly assist the emergence of a town centre office market. In order to create a market, initial development should look to relatively small units (2-3 storey with their own front door) that are likely to attract local professional services businesses such as lawyers, accountants and the like, that are currently situated in sub-standard accommodation in the centre or are forced out of it altogether as a result of the lack of suitable accommodation.
- 4.25 At the same time, significant emphasis should be placed on addressing labour market constraints on growth in the professional/business services sector. The skills and qualifications of the local workforce are the most significant factor for such businesses,

and strategies to enhance qualification levels and to increase participation in further and higher education may well be coming to fruition by the time such office development comes on stream.

- 4.26 As with office market, there is very little residential accommodation within the town centre, although some of those consulted suggested that there was potential for town centre residential development if other elements of the town centre offer can be improved. We note that the Council's Strategic Housing Land Availability Assessment (SHLAA) has identified a number of sites in the town centre which have the potential to accommodate residential uses⁷. In particular, improvements to the leisure and restaurant/café offer would make the centre more desirable to purchasers and as such, opportunities in this regard should be sought.
- 4.27 However, house prices of every type are significantly below the national averages. As such, in order to create a market for town centre residential uses, it may be necessary to identify a high quality site for an exemplar development (examples may include a shared ownership scheme, or private retirement properties development which capitalises on proximity to a wide range of facilities in the town centre). High quality design of affordable homes is likely to demonstrate to the wider market that there is latent demand for town centre living if the right product can be provided at the right price.
- 4.28 It is clear from the above, that the focus for regeneration and development investment and activity should be Nuneaton Town Centre. It has suffered significantly from the dissipation of demand to out of town locations.

Assets & Opportunities

- 4.29 Revised projections for Nuneaton suggest that approximately 15,000sq. m (net) of comparison retail floorspace will be required in Nuneaton over the period to 2021 and 25,000sq. m (net) over the period to 2026 (reduced from 25,000sq.m to 2021 and 35,000sq. m to 2026). This is discussed further in the following section.
- 4.30 Similarly, the West Midlands Regional Centres Study suggested an additional 20,000sq. m of office floorspace should be provided in Nuneaton town centre over the period to 2021 (although the Preferred Options RRS increased this to 30,000sq. m over the period to 2026). More recently Nuneaton and Bedworth Borough Council commissioned an Employment Land Review for the Borough which also suggests that Nuneaton Town Centre should accommodate in the region of 30,000sq. m of new office development. If this level of occupation is to be realised, it will be essential to

⁷ We understand the Council expects the SHLAA to be published for consultation in early 2010.

ensure that the right kind of accommodation is provided in the right locations for businesses and other barriers to business attractiveness, such as the skills and qualifications of the local workforce, are addressed. These projections of future demand for retail and office uses in Nuneaton represent a significant opportunity for the town centre to capitalise upon. However, as mentioned above, this will only occur if strong emphasis is placed on the town centre as the focus for development and investment.

- 4.31 The River Anker presents perhaps Nuneaton's greatest and most under-utilised asset. There is a significant body of evidence to show that river and canal-side locations add value to development and development sites. Despite this, none of the existing developments along the river corridor through the town centre fully capitalise on this asset. Indeed, much of the land either side of the river is badly under-used. Such environments are often sought after by residential developers and by higher order retail and leisure operators seeking high quality/character accommodation.
- 4.32 More widely across the town centre there is an opportunity to improve the physical environment of the town centre, including a uniform public realm which 'guides' visitors through the centre, clearly linking the core components of the town centre. We note the introduction of new directional signage at key points across the town centre in this respect. Other potential improvements to the physical environment which could be considered including the improvement of paving (although we do not consider this represents undue cause for concern at present), further 'greening' of the town centre, and the introduction of new public seating / dwell areas. The introduction of such physical environmental improvements is of course largely dependent on sufficient funding for such schemes being made available, but it is possible to achieve 'quick wins' in this respect, at relatively little cost.
- 4.33 The Arup masterplan of 2004, albeit historic, is effective in identifying development opportunities throughout the centre; particularly given there has been little progress on the sites identified. Many of these utilise publically owned land assets, which provide an excellent opportunity to 'lever in' private sector investment and development. The absence of the need for commercial rates of return on the land-holding, mean that the council can dispose of sites on terms and for development that are agreeable to them. In this way, the Council can use its asset base to realise its objectives for the centre and the extent of Council land ownerships, if exploited effectively, could provide a major fillip for the centre.
- 4.34 Another opportunity exists through the activities of the Coventry, Solihull and Warwickshire Partnership and the funding available from Advantage West Midlands

through the Coventry and Nuneaton Regeneration Zone. Current and proposed activities in Nuneaton already include improvements to the town centre's environmental quality and security, new library and learning facility, arts theatre and conference facilities; and a new bus stations and creation of development sites for inward investment. However, there remains a threat to the town centre if projects that compete with the town centre (for office, retail or leisure demand) are promoted and/or funded. We understand that the Council is in the early stages of considering designating Nuneaton town centre as a Business Improvement District (BID), and such as measure would potentially be a further funding stream on which to draw.

- 4.35 Clearly the strategic location of Nuneaton as a whole is a strong asset, given its location close to the M6, M69 and A5. In particular respect of the town centre, the supply and location of car parking can be considered to be a further asset. The location of the car parks in the town centre are such that they are readily accessible from each of the key arterial routes into the town centre, which ensures relatively little circulation of traffic on the ring road for this purpose. The bus station is well located in respect of access to the shops and facilities of the town centre, and offers strong inter- and intra-urban connections, including the introduction of the 'Matrix' quality bus service, linking the town centre with Bedworth and Coventry. The town's rail station is five minutes' walk from the town centre, and provides direct rail connections to Leicester, Hinckley, Birmingham, Bedworth, and Coventry, as well as hourly connections to London and Milton Keynes. However journey times to London are relatively slow (1hr 45 minutes) as there has been a reduction in the number of fast services to London on the West Coast Main Line vis-à-vis nearby centres such as Rugby (which can be reached from London in 50 minutes).

Bedworth

- 4.36 Bedworth town centre lies approximately 3.5 miles to the immediate south of Nuneaton, with a largely contiguous built up area between much of the two settlements. As such, the retail catchments of the centres very much overlap, and residents of Bedworth will invariably look towards Nuneaton (as well as Coventry, both the city centre and the Ricoh Arena Shopping Park, and other centres) for their comparison goods shopping requirements. Given this, Bedworth can be expected to fulfill a more local need, and the nature of the retailers present in the centre, which are geared towards the convenience / local shopping market, largely reflects this.

Presence of national retailers

- 4.37 Out of RTP's 'basket' of 50 retailers identified in Figure 3.1, we note that just six have representation in Bedworth. These include health and beauty retailers Boots, Savers

and Superdrug, as well as Specsavers Opticians, and fashion retailers New Look and Peacocks. The presence of two fashion retailers is nevertheless a positive attribute, and although they are at the lower end of the fashion market, this can be considered reflective of both the role and function of Bedworth in the local retail hierarchy, and the local population demographic. As would be expected, all of the national retailers trade from relatively small units and therefore only offer a limited range of goods compared to what would be found in a higher order centre.

- 4.38 Our site visits to Bedworth town centre confirm the retail offer is largely geared towards the value end of the retail spectrum as witnessed by the presence of retailers such as Peacocks and Ethel Austin. The town has strong convenience goods representation, with retailers present including Tesco, Aldi and Iceland. The Tesco store can be considered to form the anchor store to the town centre, despite its relative detachment from the rest of the retail offer. There are a large number of independent retailers in both the convenience and comparison sectors.
- 4.39 The town centre has a small Co-Op department store although this was noted to be very quiet at the time of our visit and relatively limited in the range of goods it sold; accordingly the store cannot be considered to play the role of an anchor store in the way a larger department store such as Debenhams does in Nuneaton. Prior to its closure, the Woolworths store would have been considered the anchor comparison goods store, given its central location. However the recent redevelopment of the former Kwik Save site to form two new units - occupied by Aldi and Home Bargains - suggests the axis of the town centre has shifted westwards and these stores, along with Tesco, now perform anchor roles. The comparatively low footfall noted on King Street, on the opposite side of the town centre, would appear to support this view.
- 4.40 A key issue in the town centre is the presence of a large number of charity shops and low-grade retailers within the prime shopping area, particularly All Saints Square. Experian Goad's centre for report for Bedworth (March 2007) identified that the number of charity shops in the town centre was over double the national average, and we are of the opinion that the number of charity shops in the prime area continues to be above the average which would be expected for a centre such as Bedworth.

Retail rankings

- 4.41 The more limited role Bedworth plays in the retail hierarchy of the area is reflected in its position of 612th in the 2008 Management Horizons Europe 'UK Shopping Index', which identifies Bedworth as a 'Minor District' centre with a 'lower'-grade market position in terms of retail offer. Indeed Bedworth's position in the Index has shown consistent decline in recent years, from 516th (2000-01 Index) and 589th (2003-04

Index). This would appear to give cause for concern and suggests the town is losing ground in the retail rankings vis-à-vis centres of a similar size which have more successfully improved their retail offer in comparison to Bedworth.

Vacancy rates

- 4.42 At the time of our visit to the centre significant concentrations of vacant units were particularly noted in the All Saints Square area, including large vacant units formerly occupied by Woolworths and Select Clothing. Experian Goad's Category Report for Bedworth (March 2007) identified a vacancy rate in the town centre of 12.86 per cent of all units, and 15.18 per cent of all floorspace, affirming the fact that the units in the town centre are generally on the small side. Consultations with the town centre manager suggest the vacancy rate in Bedworth is currently in the region of 7 per cent, however we are of the opinion that in recent months the vacancy rate in the primary areas, particularly All Saints Square is likely to have increased somewhat.
- 4.43 The town's Woolworths store ceased trading in December 2008 (as a result of the company entering administration, rather than being reflective of the performance of the town centre): as this store formed an 'anchor' store within the centre, it is important to ensure that it is re-let to an established retailer which will be able to further increase footfall in the town. We understand that demand for the unit has been relatively minimal but the Council is working proactively to secure the letting of the unit. The high number of vacant units in this part of the town centre lends it a run-down feel, particularly given that much of the rest of the retail offer in All Saints Square is discount and charity shops.
- 4.44 Elsewhere in the town centre whilst vacant units were noted, there were no significant further concentrations and as such there is no immediate cause for concern, as vacant units do arise in even the strongest performing centres. For Bedworth the immediate priority is thus tackling the concentration of vacant units in the All Saints Square area. Securing a strong anchor store to replace Woolworths is the key to this and will likely bring about the letting of other vacant units in the vicinity of the store.

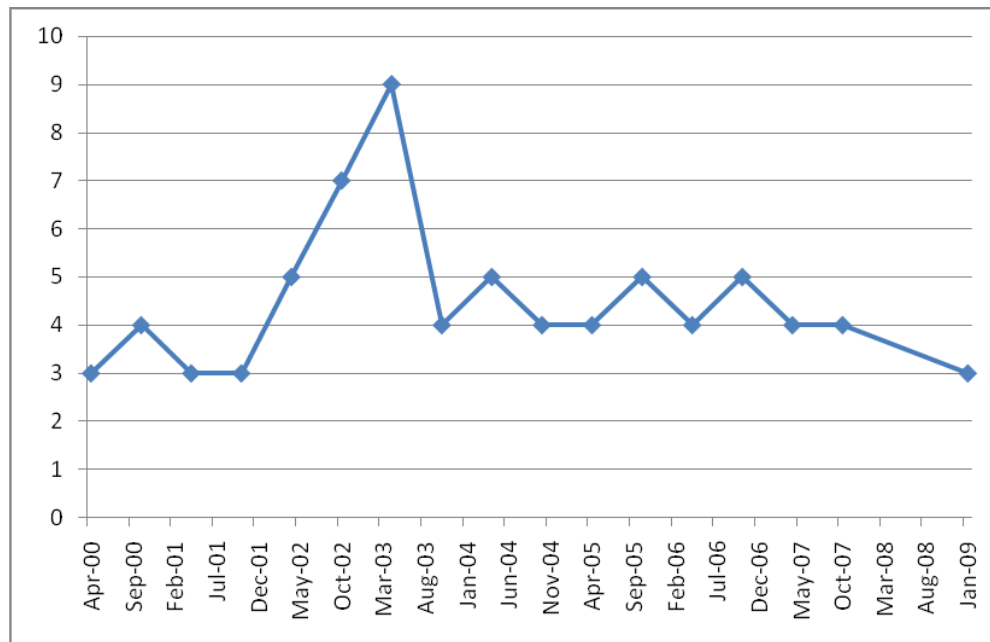
Retailer requirements

- 4.45 Retail requirements, as identified on the FOCUS database, are presently low for Bedworth, and include two charity shops, electrical retailer Brighthouse, and pubs/taverns operator Marstons. It is considered there is potential for Bedworth to improve in this respect; however retailer requirements are invariably influenced by the quality of the retail floorspace available; if new retail floorspace was to come forward, it would be expected the number of requirements would correspondingly increase. The majority of the vacant units in the town at present (Woolworths aside) are relatively

small and are therefore more likely to appeal to independent retailers rather than national operators, particularly given the proximity to Nuneaton. Where opportunities arise, consideration should be given to the amalgamation and internal refurbishment of adjacent units in order to create larger, modern floorplate stores which are more likely to prove attractive to national retailers.

- 4.46 Figure 4.1 shows the retail requirements for Bedworth from 2000 onwards. As can be seen, the number of requirements for premises in the town steadily increased between 2001 and 2003, to a peak of nine in March 2003. However, subsequently, the number of requirements has fluctuated between four and five much of the past five years, but dropped to just three in January 2009, affirming that retailer demand for Bedworth remains subdued.

Figure 4.1 - Retailer requirements for Bedworth, 2000-2009 (Source: FOCUS)



Diversity of uses

- 4.47 Experian Goad's Category Report for Bedworth (published March 2007) provides a useful overview of the diversity of uses in Bedworth town centre, although it is acknowledged that there will have been some changes to the retail offer in the town centre subsequent to this. The report shows that convenience uses accounted for 15.0 per cent of all uses in the centre, significantly above the UK average of 8.81 per cent. This affirms the important role Bedworth plays in meeting local day-to-day retail shopping needs. Indeed, the recent opening of the Aldi store has strengthened the convenience offer of the centre further still.

4.48 Conversely, representation of comparison goods retailers is just 27.14 per cent of units, compared to the UK average of 34.57 per cent - a difference of 7.43 per cent. This is a function of the lower-order nature of the centre to an extent; but nevertheless there is clear scope for improvement in this respect. The Goad report identifies a number of comparison goods sub-sectors which have no representation in the town, including booksellers; crafts, gifts, china & glassware; menswear & accessories; general (ladies and men's) clothing; music and video; and telephones & accessories. There would appear to be clear gaps in the qualitative comparison goods offer in Bedworth town centre at present therefore. Some of these are reflective of the proximity to Nuneaton and Coventry, however even taking this into account there are clear areas for improvement.

4.49 The proportion of units given over to retail services is 15.0 per cent, above the UK average of 13.0 per cent. We note however that the proportion of units in the leisure services sector (which includes bars, public houses, restaurants, cafes, cinemas and theatres) is just 17.14 per cent compared to the UK average of 21.49 per cent. The majority of the representation in this sector is made up from the 'fast food & takeaway' and 'public houses' sub-categories; there is no representation in the 'bars & wine bars' sub-category and just one operator in the 'restaurants' sub-category.

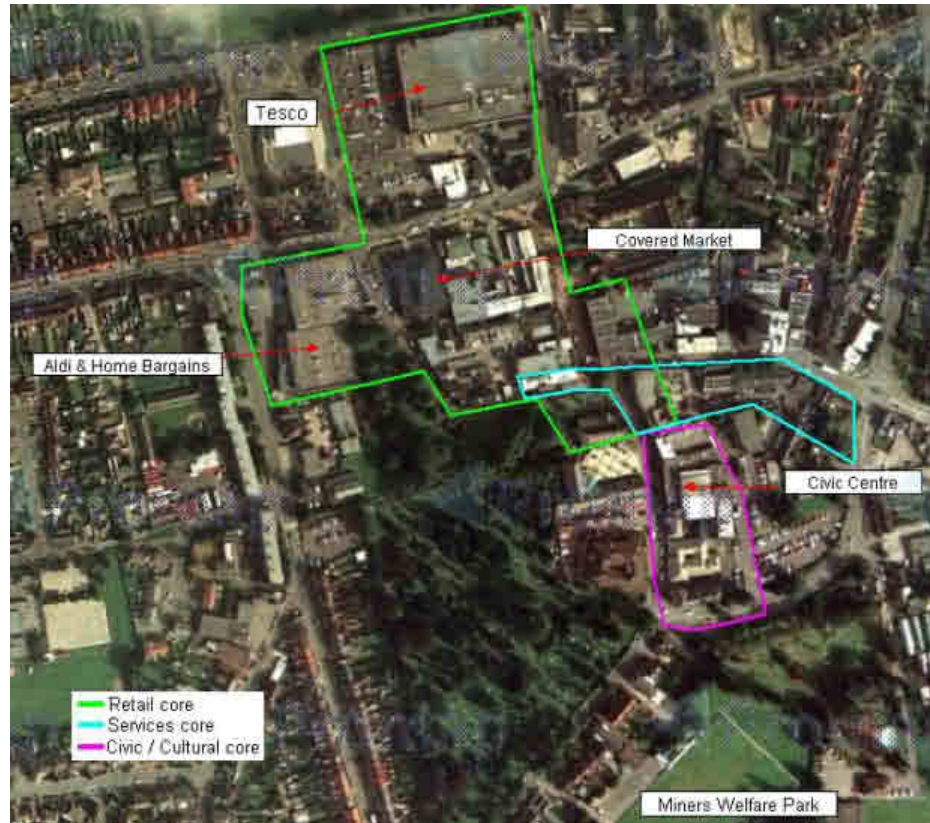
Other uses in the centre

4.50 Activity in the town centre can be observed to largely split into three areas. To the north and west of the town centre is the retail core, which largely consists of All Saints Square, Congreve Walk, the covered market, the new Aldi/Home Bargains development, and southwards across Mill Street to include the Tesco store. It is in this area of the town centre where, as would be expected, pedestrian footfall is at its highest.

4.51 The top of All Saints Square and King Street is largely given over to service uses, with a concentration of national banks and building societies (HSBC, Barclays, Natwest, Nationwide) at the junction of these two streets, and much of the rest of King Street given over hot-food takeaways, a Wetherspoon's public house, estate agents and such.

4.52 Finally, the High Street area can be considered the civic/cultural cluster, which includes the Civic Hall and Library and the recently-developed medical centre. High Street also links to the Miners Welfare Park on the southern side of the Rye Piece Ringway. The key 'zones' which together comprise Bedworth town centre are illustrated graphically at Figure 4.2.

Figure 4.2 - functional areas in Bedworth town centre



What Does and Does Not work well in Bedworth & Why

- 4.53 The Civic Hall is clearly a key attractor in the town centre and one of the few uses presently in the town centre with the capability of attracting significant visitors to the centre outside of retail trading hours. The dwell-time facilities within the Civic Hall such as the café appeared well-supported during the daytime at our time of visit. We understand the Centre already hosts a number of festivals of regional interest. The centre currently contains little in the way of complementary facilities to support the positive asset of the Civic Hall - there are very few restaurants and bars in the town centre for example, as we have noted above. Although the small nature of the town centre suggests there would only be limited capacity for such uses, it is considered further provision of such uses would aid dwell-time and visitor spend in the town centre both during the daytime and outside of trading hours. Markets are held in the town centre three times a week and these can also be considered an asset to the town centre and an important generator of footfall.
- 4.54 The proximity of the Miners Welfare Park to the town centre is a key asset for the centre, although it appears somewhat under-utilised. Improved connectivity and the introduction of better directional signposting (whilst we note recent investment has

taken place in this respect, it is considered further could be provided) and improved crossing facilities across the Ringway could lead to increased numbers of linked trips between the park and centre and, therefore, increased usage of both.

- 4.55 Generally, the connectivity between the different areas of the centre appears poor, with Tesco, Aldi & Home Bargains and the Civic Hall operating almost as three distinct areas. This is likely to lead some shoppers to use part of the centre and then leave, rather than stay in the centre and use its other facilities. The cause of this is, in part, the high level of vacancy and the low order of retailing found at All Saints Square, which connects the elements together. High quality pedestrian routes that are active and attractive are required to better 'knit together' the centre.
- 4.56 It is encouraging to note the town centre is benefiting from investment: the recently-opened Aldi and Home Bargains stores on the site of the former Kwik Save supermarket are a positive addition to the retail offer of the centre, and complement its local shopping function, although again it should be noted that both retailers operate at the discount end of the retail spectrum. Nevertheless it is clear that both stores have played a significant role in improving the vitality and viability of the town centre; as we note above they can now be considered to form an anchor role to the retail offer in the town centre and at the time of our visit both stores were trading healthily. We understand that footfall in the town centre and to the market hall (adjacent to the new development) has posted an increase.
- 4.57 Further investment in the town centre is underway as part of the extension and remodeling of the Tesco store, which anchors the town centre. This will deliver qualitative improvements to the retail offer of Bedworth, being centrally located and abutting the prime retail pitch on the opposite side of Mill Street.
- 4.58 The reconfiguration of the existing, outmoded store (which turns its back on the town centre, discouraging linked trips with retailers elsewhere in the centre) will provide an enlarged store, as well as a number of smaller retail units, to front Mill Street. This will assist significantly in further improving the vitality and viability of the town centre, as well as providing an aesthetic improvements to the current building, which is of poor quality. The development will also better 'knit' the main anchor to the town centre with the rest of the retail offer and will also remove the majority of through traffic from Mill Street, which will further enhance the pedestrian environment of the centre.

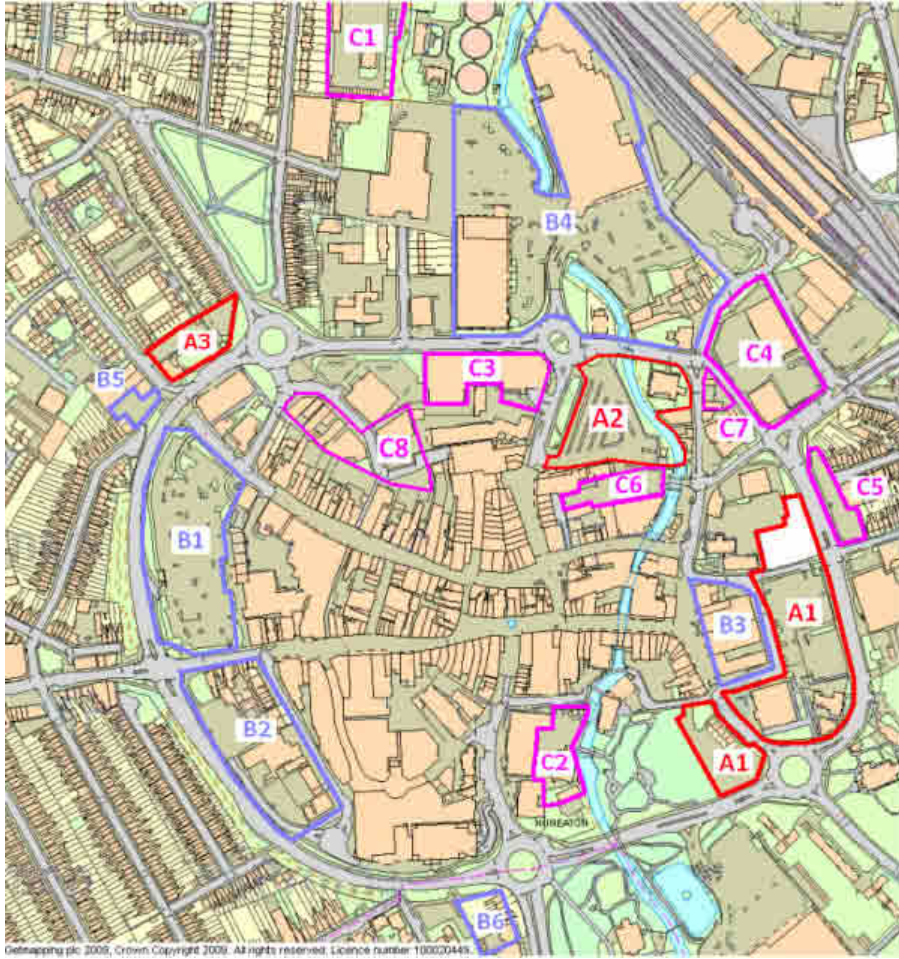
5 SITES WITH DEVELOPMENT POTENTIAL

Introduction

- 5.1 This section of the report identifies the sites within Nuneaton and Bedworth town centres which have potential to be brought forward to meet the identified demand for new development; address the causes of underperformance and capitalise on assets and opportunities as set out in the preceding sections. The suitability, viability and availability of each site to accommodate town centre uses are also assessed below. Similarly, in assessing the sites, some initial thoughts as to the potential nature of future development are also set out.
- 5.2 In identifying potential development sites, the study team have used those identified in the 2004 Masterplan as a starting point, given that there has been no significant development activity on them since that time. These sites have been added to as a result of visits to and analysis of the two town centres and in partnership with the study's Steering Group, comprising officers of the Council and Nuneaton's Town Centres Manager.
- 5.3 Based on the assessments of suitability viability and availability, the final part of this section sets out an initial prioritisation of the sites, which is subsequently refined in Section 7, following the feedback from the Vision, objectives and options workshop which took place in September 2009.

Nuneaton

- 5.4 Figure 5.1 below summaries the location of each of identified sites with development potential in Nuneaton town centre.



Note: Site C1 not fully on map

Site A1 - Church Street / Vicarage Street



- 5.5 The parcel of land on the eastern fringe of the town centre, bounded by Vicarage Street (the ring road) to the south and east, and Church Street to the west, is identified with the Masterplan as a development priority. The site is close to the recently-completed Criminal Justice Centre (on the opposite side of Vicarage Street). Uses on the site at present are largely restricted to surface level car parking, as well as the town's main library, which is now somewhat out of date. The site forms a key gateway to the town centre and the quality of development to be brought forward on the site must reflect this. Clearly, its profile and accessibility afford the opportunity of a flagship gateway development to act as a stimulus both to pedestrian footfall and to further development activity on the eastern side of the town centre, particularly given the presence of a number of other redevelopment opportunities on adjacent and nearby parcels of land.
- 5.6 The 2004 Masterplan states that the site should be developed to provide *'a predominance of offices and studio/work shop accommodation, supported by cafes and retail (principally a food store). Residential units are provided in the upper floors'*. Since the publication of the Masterplan, no further development has come forward on the site. Given the proximity of this site to the core of the centre and to the Criminal Justice Centre, it should be considered as suitable for development providing additional town centre use floorspace, including retail, leisure and offices. In addition it is also considered suitable for residential development. Re-provision of car parking may also be required as part of any future development.
- 5.7 In current market conditions, much development is not viable due to the very limited availability and resultant high cost of debt finance for developers and investors. The businesses and individuals that will subsequently let or buy development are also faced with shortages of business development finance and mortgages. However, there are now some signs of easing in the credit markets and it can be expected that, upon the return of more 'normal' conditions in this regards, the development of this site will be viable. In particular, any retail or residential elements of a scheme are likely to demonstrate good levels of viability (provided that a product that is attractive to the market is provided), and whilst leisure and office/workspace may be somewhat less viable, they could form part of the development mix. Of course, any abnormal development costs or requirements for unprofitable development (such as multi-storey car parking or affordable housing) to be included in any scheme will have implications for viability.
- 5.8 The majority of the site is under Warwickshire County Council and NBBC ownership, although a church to the south-east corner of the site is under private ownership and

would need to be acquired to allow for the comprehensive redevelopment of the site. Whilst any acquisition will be left to the developer of the site, the Council is willing to use its compulsory purchase powers to enable the acquisition. The Council intends to market the part of the site it owns site during summer 2011, so it can be considered to be available for development in the short term.

- 5.9 We have also included within this site a further parcel of land to the north west of the junction of Church Street and Vicarage Street (part of the ring road) and also predominantly in use as car parking, with a small number of commercial premises fronting onto Church Street. This site was not included within the Church Street / Vicarage Street opportunity area identified within the Masterplan but clearly forms a natural extension of this site. This parcel could therefore also be brought forward to accommodate development to complement that on the main site as noted above. Again, the development is in a key gateway location and the quality of the development on the site should reflect this. Consideration should also be given to providing uses which complement those recommended for the Church Street Cultural area (Site C2). As this site is also under the ownership of NBBC, there is potential for it to be brought forward at the same time as the larger parcel of land to the east, and therefore jointly marketed and comprehensively redeveloped. Should this parcel of the site also be redeveloped, the need for re-provision of car parking as part of any redevelopment proposals gains increasing importance.

Site A2 - Bus Station and surrounding environs, Newton Road / Harefield Road



- 5.10 The site lies to the northeast of the core of Nuneaton Town Centre within the ring road. It is bounded by Newtown Road (which forms part of the ring road) to the north, Harefield Road to the west, and Bond Street to the east. The River Anker runs through the middle of the site. The town's main bus station occupies the entire swathe of land

between the river and Harefield Road. On the eastern side of the river are a number of low grade, low density uses including a community centre. Vehicular movements in the area are high due to the ring road, and the large number of buses entering and departing the site from the junction of Newtown Road and Harefield Road. The route around the site is the principal means of access to the town centre from those arriving by rail.

- 5.11 Any development of this site should deliver a permeable, identifiable link through the site to facilitate ease of movement between the town centre, bus station and rail station (as suggested in the 2004 Masterplan), in order to improve on the current poor links between the three components. This may require the inclusion of land east of the River at the junction of Bond Street and Newtown Road.
- 5.12 Given that this site is underused, but benefits from high profile and is the gateway for pedestrians coming from the Station and is well related to the shopping core of the centre, it is considered suitable for development for additional town centre use floorspace. The 2004 Masterplan envisages a reconfigured and rationalised bus station to the west of the site, with the introduction of leisure and cultural facilities on the newly-released land, fronting the River Anker. Other suitable uses could include retail (to take advantage of the high footfall); and leisure and residential uses (capitalising on the amenity value/potential of the River); and offices.
- 5.13 It is understood that the majority of the site is owned and operated by NBBC, and therefore assembly of the site for redevelopment is feasible. The bus station is the subject of usage agreements with all bus service operators and any obligations on the Council in this respect would have to be resolved if development were to proceed. Discussions and feasibility studies have already been undertaken and the principles of redeveloping/reconfiguring the Bus Station are established between the key partners. As such, the site can be considered available for development in the short-medium term.
- 5.14 Consultations with local property agents and developers have indicated that demand from leisure operators in Nuneaton at present is relatively low. However, it is likely that this reflects the present lack of a quality setting and sufficient concentration of modern premises required for the establishment of leisure and related facilities, which invariably influences demand. The key requirement in respect of the development of this area is to capitalise on the 'hidden asset' of the River Anker. This will add value to development and assist with its viability. The inclusion of other uses, such as residential and/or offices in upper floors should also mean that a viable scheme can be found subject to the costs and funding of the new Bus Station.

Site A3 - Land at junction of Abbey Street and Roanne Ringway



- 5.15 This site lies to the north side of the Roanne Ringway but very close to the western side of the town centre and with good pedestrian crossing links to Abbey Street. The site was previously occupied in part by a public house that is now vacant and semi-derelict with the remainder being unused land. To the rear of the public house is Upper Abbey Street car park, a small car park which is operated by NBBC. To the north lies an area of largely residential uses. This site, along with that of the former bingo hall on the opposite side of the ring road detract from the environmental quality of this part of the centre, which is a 'gateway' to those arriving from the north west. The Council wishes to make this location a priority target for redevelopment in the town centre.
- 5.16 Whilst the site is located outside of the ring road, it is relatively accessible to it and as such could be suitable for the type of town centre uses that seek the profile and accessibility of town centre locations but greater value and affordability of non-central locations. Such uses include managed workspace, accommodation for the creative industries, visitor attractions, nightclubs and community uses amongst others, although all of these may not be suitable given the proximity of residential uses. Residential development would also be suitable in this location and would provide increased expenditure in the centre, particularly support leisure uses including bars, cafes and restaurants.
- 5.17 Residential development is likely to be viable in this location, following the return of developer debt finance and mortgage finance to individuals/households. The viability of development for many of the other uses identified (such as workspace etc) is likely to be dependent on being able to acquire the site for a suitably beneficial price.
- 5.18 On the basis that the site is unused, save for the small area of parking, it is likely that the site could be assembled/acquired for development in a relatively short period

(subject to the value aspirations of its current owners) and as such could be available for development in the short-medium term. Given existing and proposed parking provision elsewhere in the centre, it is not considered necessary to replace lost parking as part of and development on this site.

Site B1 - Abbey Street surface car park



- 5.19 This site is a large surface car park on the western fringe of the town centre, on land bounded by the ring road to the west, Abbey Street to the north and Queens Road to the south, adjacent to the Co-Op department store and supermarket on Queens Road. There is also potential for the site to be extended northwards to include the former Gala Bingo Hall on the north side of Abbey Street.
- 5.20 Its location immediately adjacent to the existing core retail area and within the ring road make it suitable for development for additional town centre uses including retail and office uses. Whilst leisure and residential development may also be appropriate in this location, it does not - in its present form - benefit from the environmental amenity quality that attracts demand for them. It is clear that the site currently provides a significant amount of parking serving the centre and, as such, re-provision of parking that makes more efficient use of land (i.e. multi-storey) is likely to be required as part of any redevelopment proposal. If located in the central part of the site, the frontages to Abbey Street and Queen Street could be made available for development that would capitalise on their profile and accessibility.
- 5.21 Any necessity to provide a multi-storey car park, which are of very marginal viability at best, is likely to have to be accompanied by more profitable development on a significant scale. It is considered that scheme comprising a combination of retail and office uses, perhaps with some residential development (for which demand would improve in line with enhancements to the amenity of the area) would be viable. We understand however that there is a potential contamination issue to the southern edge

of the site, which would need to be remediated as part of any redevelopment of this site.

- 5.22 Again, the land is in the ownership of NBBC, and therefore site assembly is not required to promote the comprehensive redevelopment of the site and as such it can be considered available for development in the short term.

Site B2 - Victoria Street / Dugdale Street



- 5.23 Site B2 comprises the parcel of land bounded by Queen's Road to the north, Dugdale Street to the east, Victoria Street to the south and the Roanne Ringway to the west. The site lies immediately to the west of the Ropewalk Shopping Centre and to the south of the Abbey Street Car Park potential redevelopment site. A large part of the site is in use by two Council-operated surface car parks. They are located immediately inside of the ring road to the south east of the retail core. The sites are both accessed via Victoria Street - a cul-de-sac which is accessed via Dugdale Street. Despite their proximity to the prime shopping area, the car parks, in particular the northernmost of the two, are relatively lightly used. There are a number of office and low-grade operations fronting onto Dugdale Street, which do not attract significant volumes of footfall, and are of poor physical environmental quality. Retail uses front onto Queen's Road, providing the link between the primary shopping area and the Queen's Road Local Centre which lies to the opposite side of the Roanne Ringway.

- 5.24 Whilst the car parks are in Council ownership, and are therefore likely to be available in the short-term, and could be disposed of on favourable terms, in isolation they are unlikely to be attractive to the developer or occupier market for town centre uses. We understand the rest of the site to be under several different ownerships, which ensures that site assembly may be difficult, although a significant portion is owned by Warwickshire County Council. The Council has aspirations for the site to be developed comprehensively, and this approach is supported. We understand that planning

applications for retail development have been submitted on the site, although our view is that this would prejudice the site's comprehensive redevelopment. It is considered the site should be considered a longer-term aspiration. Should the comprehensive redevelopment of this site come forward, it is recommended that active retail frontages continue to be maintained along Queen's Road.

Site B3 - Former Post Office / Wilkinson site, Church Street



- 5.25 This site is formed by land bounded by Church Street / Bond Gate, Mill Street and Wheat Street. Much of the site remains in active retail / leisure use, however the site also include a large vacant unit which was until recently occupied by the town's Post Office. The existing buildings on the site are aesthetically poor and the area appears tired and run down. The site is adjacent to the Church Street / Vicarage Street site (Site A1) and the Church Street site (Site B2) and there may be potential for combined redevelopment (particularly with Site A1).
- 5.26 The existing Wilkinsons store on the site is outmoded and cramped, and it is thought that the retailer is looking for additional floorspace to increase their presence in Nuneaton, as the store appears to trade very strongly, but is unable to accommodate a comprehensive range of products by virtue of its limited size.
- 5.27 Given the location of this site within the main retail area of the town centre, a retail-led redevelopment would be suitable, particularly if it could provide a strong anchor in the east of the centre (as Wilkinsons is at present) that would in order to encourage pedestrian footfall along the eastern end of Queens Road and promote an attractive and identifiable retail circuit throughout the town centre. Other uses, such as offices and residential are likely to be suitable
- 5.28 It is known that the site is the subject of a number of freehold and leasehold interests and as such assembly of the site may be costly, difficult and time-consuming. Clearly this has significant implications for both the viability and availability of this site. Even if

the site can be acquired by negotiation (i.e. without the need for CPO), it can only be considered available in the medium term.

Site B4 - Asda store and retail warehouses, Newtown Road



- 5.29 The Asda and Sainsbury's stores, which are the principal food stores in Nuneaton, are both within walking distance of the primary retail area in Nuneaton but, in the case of Asda particularly, are poorly related to the rest of the retail offer. The Asda store is located outside of the ring road to the north of the centre. It opened in 1987 and is relatively dated and cramped. To the west of the site are three non-food retail units, which are equally in need of refreshment. The Asda store presently sits to the north of the site, at the furthest point from the town centre. It is not easily reached on foot from the town centre, divorced by the ring road and a large tract of car parking. As such these retail units do not function as part of the town centre retail offer but rather operate on a standalone basis. The site also includes substantial areas of parking serving the retail uses. The River Anker passes through the centre of the site.
- 5.30 Asda has expressed an interest in the past in redeveloping this site to create a more modern unit which better relates to the ring road and the core of the centre beyond it and may also consider a wider redevelopment including the three retail warehouse units on the site, and the substantial areas of car parking.
- 5.31 Clearly, given the established nature of retail use in this location retail-led development is most likely and is considered suitable, particularly if more effective connectivity with the retail core can be delivered in order to promote linked trips. As Asda have no plans to vacate this site, the retail offer accommodated on the site will be largely convenience goods-orientated, with a qualitative improvement on existing provision being achieved. In addition, complementary uses that capitalise on the riverside location, in particular residential uses could also be suitable in this location.
- 5.32 Development at this location is likely to be developer-led rather than Council-led but should be supported provided that it delivers the benefits sought. Redevelopment

should complement the enhancement of the Nuneaton rail station gateway area as promoted in the Masterplan, and could potentially be brought forward comprehensively in conjunction with Network Rail. Given the likely nature of development, comprising an enlarged supermarket, development is certain to be viable and may offer potential to deliver other objectives through an S106 agreement/planning gain.

- 5.33 As with the Bus Station site to the immediate south (Site A2), within this site there is clear potential for increased exploitation of the frontage of the River Anker, which runs through the centre of the site (although is in part covered by access to the car parking).
- 5.34 Potential also exists for combining improvements in this area with the retail warehouses on the south side of Bond Street, which, whilst less intrinsically linked with the town centre, are aesthetically unpleasing, particularly as a 'first impression' of Nuneaton when arriving by rail.
- 5.35 We understand the Council intends to consider the redevelopment potential of this site in greater detail through its emerging Borough Plan.

Site B5 - land at Abbey Street / High Street



- 5.36 This site forms a prominent corner site fronting the junction of Roanne Ringway to the south and Abbey Street to the east. The land is currently vacant, but is reasonably constrained by retail and industrial premises to the north, residential to the west and the ring road to the south. The site has planning permission (subject to the signing of a legal agreement) for the erection of a 4/5 storey building containing offices and residential units, as well as car parking. It is understood the developer is presently considering the future potential of the project.
- 5.37 The site is well-located in respect of proximity to the town centre, and indeed a number of other redevelopment opportunities. There may be potential for a reasonably high-density development fronting onto the ring road, and if the current plans for

development at this location are not progressed, applications should be treated on their own merits.

Site B6- Coton Road



- 5.38 This site lies to the south of the town centre, on the opposite side of the Ring Road, but its prominent corner position lends it to having potential to being an important 'gateway' site. We understand that the site has recently been acquired by a local developer, and an application submitted for a mixed retail, office and residential scheme. These uses can be considered appropriate for the site, and the retail (at circa 250 sq.m) is not of a scale that would undermine the town centre. We understand from NBBC that a revised scheme is to be submitted in the near future, and advise that this should be treated on its merits.

Site C1 - St Mary's Road Depot



- 5.39 The Council have identified land at St Mary's Depot as having potential for redevelopment. (It can be assumed that any redevelopment of this site would need to be delivered in tandem with the relocation of the Council's depot facilities to an alternative site within Nuneaton.) The site is located some 300m from the main shopping streets 'as the crow flies', although much further on foot or by car as it is accessed via Bath Road and Grantham Street. As such, the site is relatively divorced from the town centre.
- 5.40 The location of the site in relation to the town centre suggests that it would not be suitable for development for town centre uses such as retail, leisure and offices. It would, however, be suitable for development that would assist in providing the expenditure capacity and usage that will support and drive improvements in the centre such as housing or, potentially, non office-based employment uses.
- 5.41 Given that the Council already own this site in its entirety, no assembly is required and it can be considered available for development as soon as an alternative location for the depot is secured. We understand the Council is presently proactively working to bring this site forward for redevelopment.
- 5.42 In terms of viability, as long as the Council's land receipt expectations are not too onerous, a profitable development scheme for the site can be envisaged.

Site C2 - Rear of Town Hall, Coton Road



- 5.43 This site comprises a parcel of land to the western side of the George Eliot Memorial Park. The land sits to the rear of the Town Hall, and is currently largely used for short-stay car parking. Its eastern boundary is formed by the River Anker. To the immediate south lies an electricity sub-station, the costs of relocation of which are likely to prevent it being included within the boundary of the redevelopment area. On the opposite side of the George Eliot Memorial Park forms the western component of site A1, and consideration should be given to uses which may complement development in this area. New development should be of a high quality, reflecting the quality of the existing environment and their gateway location - particularly the eastern site.
- 5.44 The Masterplan envisages this area as being developed for residential uses. The high quality environment and amenity of this area, afforded by the park and river, suggest that other suitable forms of development may also be suitable, particularly leisure/food and drink uses that would capture these amenity benefits in the value of development. Retail and office accommodation could also be suitable, although would not require or fully capitalise on the amenity benefits. There may be potential to incorporate the Job Centre building, to the immediate north of the boundary of the site, in order to create a more comprehensive redevelopment opportunity, although this is not identified on the site plan as it cannot be assumed to be available for development at the present time.
- 5.45 As with many of the sites identified, full ownership lies with NBBC and therefore no site assembly is required and both sites can be considered available for development in the short term.

- 5.46 Subject to no significant abnormal development costs, the additional value resulting from the high quality setting of this site should mean that development for the uses envisaged is viable. We do not consider there is a need for replacement car parking to be provided on this site given existing and proposed provision elsewhere in the centre.

Site C3 - Multi-storey car park - Newtown Road / Harefield Road



- 5.47 This site is currently occupied by a 603-space long-stay multi-storey car park, which is accessed via Harefield Road. It is within the inner ring road just to the north of the retail core. The car park is the largest in the town centre and plays an important role in meeting demand for shoppers wishing to visit the eastern side of the town centre, in particular the Abbeygate Shopping Centre, to which it is close. However, if redevelopment and some loss of parking is considered acceptable, the site could present an opportunity to capitalise on the frontages onto the ring road and Harefield Road. High quality development would be a necessity at such a high profile gateway location.
- 5.48 Suitable alternative uses of this site are likely to include offices and retail and, perhaps, leisure uses also. Given the scale of existing parking provision, it seems likely that some replacement would be required as part of any redevelopment. An alternative might be to reconfigure the existing structure to provide retail accommodation at ground floor level, whilst retaining the parking above.
- 5.49 However, it should be noted that even a more limited scheme such as this may not be viable and it is unlikely that any comprehensive redevelopment of the site would be viable after the acquisition and demolition costs of the car park were factored in.
- 5.50 We are not aware of any proposals for the redevelopment of this site at present and it cannot be considered available for development in the short or medium term.

Site C4 - Retail warehouses, Back Street/Leicester Road



- 5.51 This site is presently occupied by two units - a retail warehouse unit occupied by soft furnishings and home wares retailer Dunelm Mill to the north east corner of the site, and a Liquid/Envy nightclub to the south-west corner fronting Leicester Road. The two units are standalone buildings and each has adjacent surface car parking. The site is bounded to all four sites by roads - Bond Street to the north and east, Back Street to the west and Leicester Road to the south. Nuneaton rail station lies a short walk to the north of the site. The site can be considered a key gateway site to the town centre for those arriving by rail and at present does not perform a role equivalent to that function. Instead, the site in fact turns its back on the station forecourt.
- 5.52 Site C4 lies close to a number of other development opportunities in Nuneaton town centre, in particular the Bus Station site (Site A2), as well as, in the longer term, the potential reconfiguration of the Asda site to the north of Bond Street (Site B4), and the railway station, for which it is understood Network Rail have ambitions for additional car parking provision. The key asset for this site is its proximity to the rail station, and the site therefore could be considered suitable for office-based development, with an ability to capitalise on Nuneaton's strong connections to London and Birmingham.
- 5.53 The site is owned by NBBC and Luminar Leisure and is therefore in multiple ownerships. Unless the existing owners decide to redevelop the site, it seems unlikely that the site will become available for development or would be viable for a developer to acquire existing interests and redevelop for an office-led scheme. A further potential benefit of bringing forward redevelopment of this site would be that it would allow for reconfiguration of the road network surrounding the site which currently does not operate overly efficiently.

Site C5 - Orchard Street surface car park



- 5.54 This long, narrow site is presently in use as a surface car park, which lies outside the Ring Road adjacent to the Warwickshire Justice Centre and opposite the Church Street / Vicarage Street (Site A1). The site is currently accessed via a single entrance on Wheat Street - a street of terraced houses. The limited capacity of this car park (55 spaces) indicates that it is not crucial to the functioning of the centre, but is likely to have a role in serving the Justice Centre. Subject to parking provision as part of other nearby development sites, the loss of parking here should not cause great concern.
- 5.55 Given the site's proximity to the Criminal Justice Centre, office uses would be suitable and may well capture demand from legal businesses. Residential development may also be suitable, although retail development (other than ancillary retail uses) would be better focussed within the ring road.
- 5.56 The site is in the single ownership of the Council and should be considered available for development in the short term. It also appears that the site is readily developable and its location would suggest that a viable scheme could be delivered.

Site C6 - Land to the rear of Newdegate Street

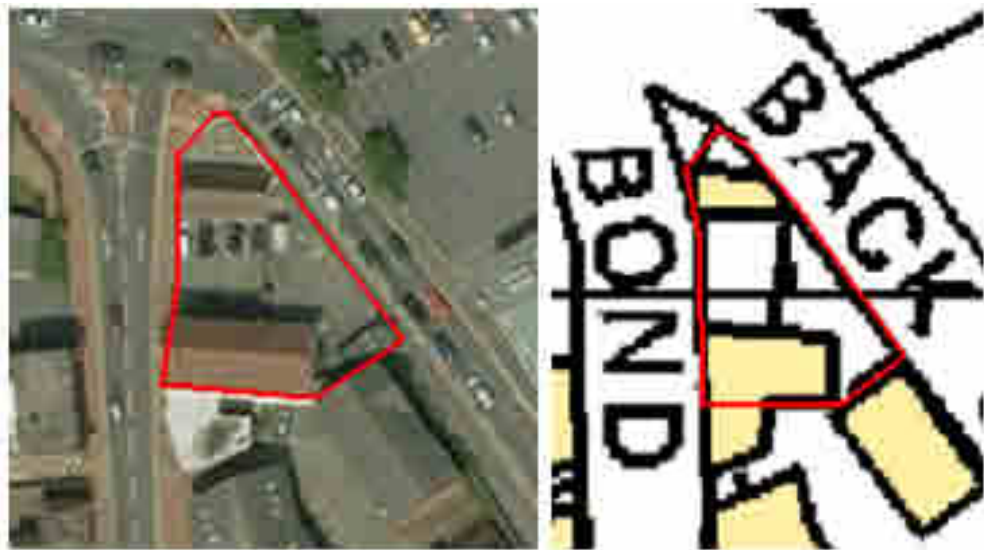


- 5.57 This site is currently in use as a surface car park operated by NCP. Access to the site is via a bridge over the River Anker accessed from Bond Street. The site forms the rear

of retail premises which front Newdegate Street, Harefield Road and the bus station complex. The site also offers a cut-through to the bus station from Bond Street, and for the servicing of the retail premises fronting Newdegate Street.

- 5.58 Potential exists for the site to be redeveloped alongside Site A2, which sits to the immediate north of the site. However, the site is evidently constrained by the retail premises which surround it on three fronts (for which servicing would need to be maintained) and the river to the eastern side, and thus the limited potential for easy access to the site. However, the site does benefit from a limited stretch of open frontage onto the bus station complex to the north and could be beneficially included as part of the proposals for the redevelopment of the bus station. This would provide a strong linkage into the town centre core when approached from the east.
- 5.59 Suitable development in this location could include residential or leisure uses, taking advantage of the riverside location. However, neither would be well suited to the western end of the site which is surrounded on three sides by the back of retail premises. The loss of the limited parking provision is unlikely to have a material impact on the functioning of the centre.
- 5.60 The viability of any scheme for this site and its availability for development are entirely dependent on whether NCP wish to dispose of the site and the terms under which they are willing to do so. There is no indication that NCP are currently seeking to dispose of the site. The provision of servicing arrangements as part of the uses on this site will invariably constrain the redevelopment of the area however.

Site C7 - Junction of Back Street and Bond Street



- 5.61 This site is bordered to the east by Back Street and to the west by Bond Street. The northernmost point of the site fronts onto the Ring Road. The site can therefore be considered a prominent site, particularly in the context of those arriving into the town by rail. The site presently contains a number of low-density commercial uses and there is clear potential for intensified use of the land.
- 5.62 We understand that outline planning consent exists for the redevelopment of this site, subject to the signing of a legal agreement. The application proposed a 6-7 storey development to incorporate retail, offices, and 40 residential units. In the context of many buildings in the town centre, this can be considered quite a significant scale; however we consider it to be appropriate for the surrounding environs. Development at this location should therefore be supported, and it is not of a scale that would undermine any potential development in the priority redevelopment areas.

Site C8 - Rear of Abbey Street & Burgage Place



- 5.63 This site covers the area to the rear of Abbey Street, south of Corporation Street, and Burgage Place. The area is close to the core retail area, but does not function as part of it, in part due to the relatively poor connectivity between the area and Abbey Street and its complete lack of profile. The uses which operate from the area at present are therefore not town centre uses, but light industry/workshop uses. There is potential for the area to be comprehensively redeveloped to form complementary town centre uses such as residential or office-led development, benefiting from the proximity to the retail core, but also with easy access to the Ring Road which sits to the immediate north of the site. There is no need for active frontages in this area, as pedestrian movements are highly limited and are likely to remain so. Any development in this location should make provision for improving linkages to Abbey Street, and the overall environmental amenity of the area, which presently has something of a run-down feel.

- 5.64 Applications for development at this site should be treated on their merits, and the site should not be considered a redevelopment priority. We understand the site to be in multiple ownerships and therefore land assembly may be an issue.

Site Prioritisation

- 5.65 Set out below is a prioritisation of sites based on the analysis above and their potential to address the causes of under-performance, capitalise on assets and opportunities and capture latent demand. This prioritisation of sites is based on the outcomes of the Vision, Objectives & Project Options workshop held in September, and the aspirations of the Council.

Category A sites - priorities for redevelopment

Site A1 - Church Street / Vicarage Street

Site A2 - Bus station and surrounding environs, Harefield Road

Site A3 - Land at Junction of Abbey Street and Roanne Ringway

Category B sites - longer-term priorities

Site B1 - Abbey Street surface car park

Site B2 - Victoria Street / Dugdale Street

Site B3 - Former Post Office / Wilkinsons site, Church Street

Site B4 - Asda store and retail warehouses, Newtown Road

Site B5 - Land at Abbey Street / High Street

Site B6 - Coton Road

Category C sites - infill sites with redevelopment potential⁸

Site C1 - St Mary's Road Depot

Site C2 - Rear of Town Hall, Coton Road

Site C3 - Multi-storey car park, Newtown Road/Harefield Road

Site C4 - Retail warehouses, Back Street/Leicester Road

Site C5 - Oxford Street surface car park

Site C6 - Land to the rear of Newdegate Street

Site C7 - Junction of Back Street & Bond Street

Site C8 - Rear of Abbey Street & Burgage Place

⁸ These are additional sites which have been brought to our attention by the Council; the site areas are generally smaller and represent more piecemeal development opportunities than the Category A and B sites but nevertheless represent important opportunities to bring forward new development in the town centre. Applications for development at these Category C sites should be treated individually on their own merits.

Bedworth

5.66 Aside from the aforementioned proposals by Tesco for the redevelopment of their store and surrounding environs, we consider that elsewhere in the town centre there are relatively few opportunities for further expansion of the retail offer, although we discuss six sites which we consider have redevelopment potential below. These sites are all relatively small-scale and their redevelopment may improve the aesthetic appeal of the town. However, as we have noted above the vacancy rate in parts of the prime retail area is currently cause for concern.

5.67 The six sites we consider have redevelopment potential are shown in Figure 5.2 below, and are as follows. We have not sought to prioritise these sites; rather, any applications which come forward should be treated on their own merits.

Site BW1 - Land at George Street Ringway / Margaret Avenue

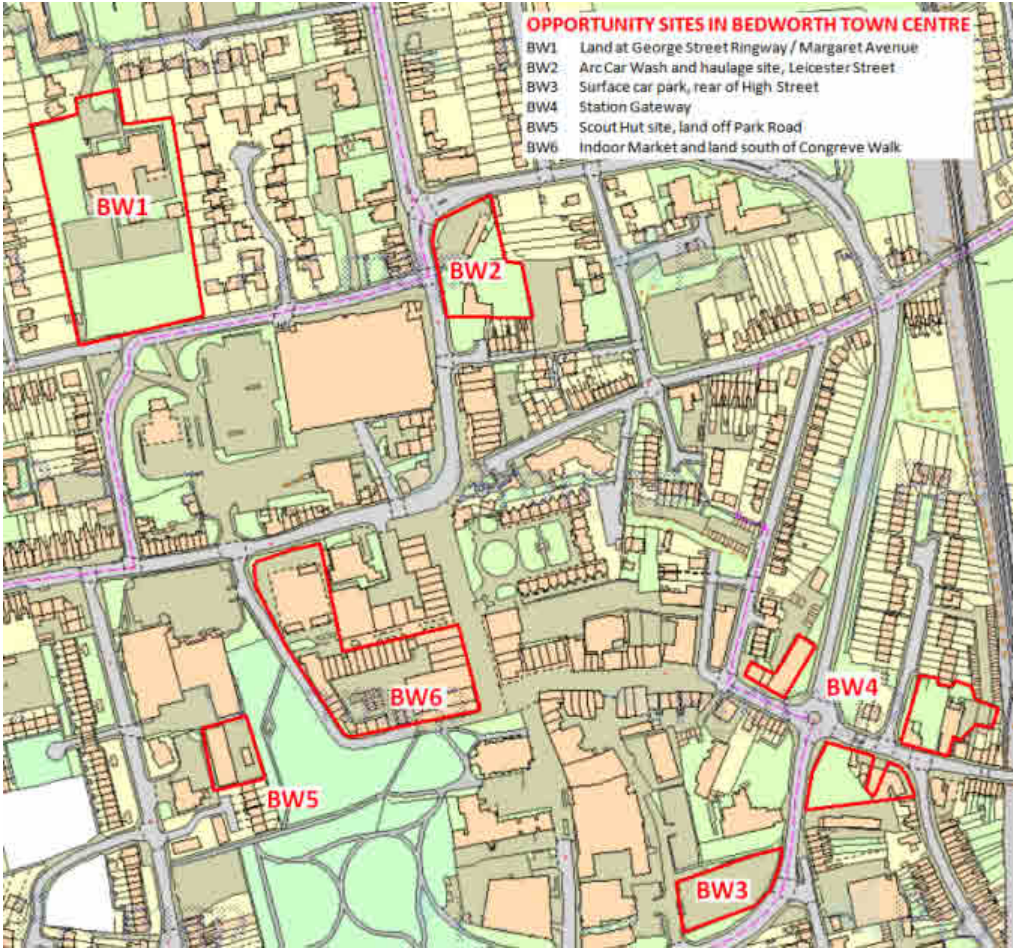
Site BW2 - Arc Car Wash and haulage site, Leicester Street

Site BW3 - Surface car park, rear of High Street

Site BW4 - Station Gateway

Site BW5 - Scout Hut site, land off Park Road

Site BW6 - Indoor Market and land south of Congreve Walk



Site BW1 - Land at George Street Ringway / Margaret Avenue



5.68 This site forms the largest opportunity for significant development near Bedworth town centre, excluding the Tesco site for which plans are progressing, as discussed above. The site is to the north of the existing town centre, and takes the form of a former school and its grounds. The site extends to circa 3.15 acres and is owned by the local

education authority, Warwickshire County Council, and is currently being marketed for sale. To the south of the site is the Tesco food store and adjacent car park; to all other surrounds are residential uses.

5.69 Whilst the site is only a short distance from the primary shopping area (i.e. All Saints Square), it is relatively poorly connected, located to the north-west of the Tesco store on the opposite side of the Ringway, in an area of very low pedestrian footfall. Accordingly, we do not believe this site represents a suitable site for retail purposes: developing retail on this site would shift the focus of the town centre away from the existing retail offer and would not readily generate 'linked trips' between the two areas of the centre; consequently the vitality and viability of the existing retail offer may be undermined.

5.70 However the site is well placed for residential development to take advantage of the proximity to the town centre facilities and public transport connections to Nuneaton and Coventry from Mill Street/Leicester Street. The site could also potentially accommodate office development; however for reasons discussed elsewhere in this report it is considered that the (limited) demand for office floorspace in the Borough should be directed towards Nuneaton town centre.

Site BW2 - Arc car wash site and haulage yard, Leicester Street

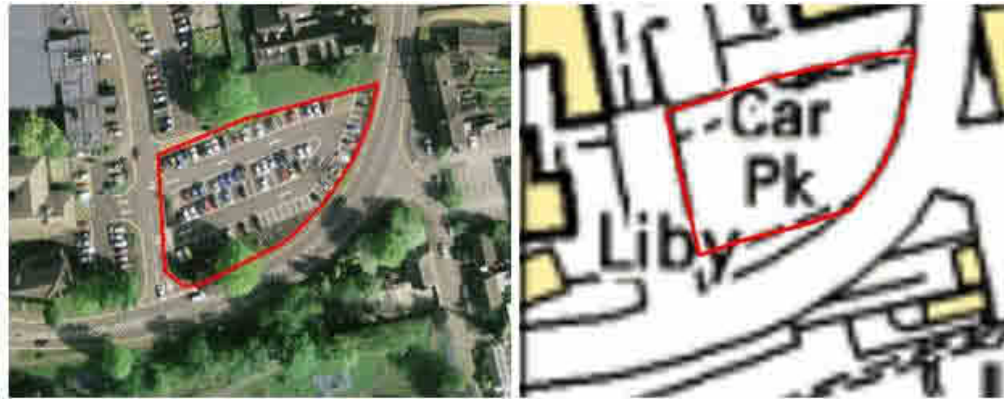


5.71 This site forms the gateway to Bedworth town centre when arriving from the north (i.e. from Nuneaton) and occupies a key corner site at the junction of Leicester Street and the Rye Piece Ringway. The northern portion of the site is currently occupied by a car wash with a large expanse of tarmac to the front of it. The southern portion is in active use as a haulage yard. Given the 'gateway' nature of the site it can be considered, in its current form, underutilised. The site is in a secondary area of the centre but has

potential to accommodate a higher density development. Again residential development that would provide additional activity and expenditure to the centre would be suitable. Active frontages to the ground floor, including retail uses, could be suitable, (subject to first addressing vacancy levels in the core of the centre) and would also strengthen links between the town centre and the small concentration of retail activity further north on Leicester Road. Limited scale office or residential development may also be appropriate. The site is in multiple ownerships and its availability in the near term is therefore unknown.

- 5.72 Together with the redevelopment of the Tesco food store on the opposite side of Leicester Street, the redevelopment of this site affords a good opportunity to regenerate the 'northern gateway' to the town centre and provide a clear sense of arrival into the town centre when arriving from the direction of Nuneaton.

Site BW3 - Surface car park, rear of High Street



- 5.73 This site is currently in use as surface car park, occupying land to the rear of the High Street, fronting onto Rye Piece Ringway. The car park was noted to have high levels of occupancy at the time of our visit, and it is the only major car park to serve the southern side of the town centre. As such it plays an important role in serving visitors to the Civic Hall, Library and Park, who would otherwise have to walk across the town centre to access these facilities. Notwithstanding this, the site also benefits from its proximity to the Miners Welfare Park and Civic Hall and has an extensive frontage onto the Ringway. Its location and environment make it suitable for uses including retail, leisure, food and drink or residential.

- 5.74 The car park is owned by the Council and as such it could be considered available for development, subject to resolving any issues with replacement parking that may be required. Any need for development of this site to fund re-provision of parking, however, is likely to have a significant effect on the site's viability. Thus it can be expected that, should a suitable opportunity arise, site assembly should be relatively

straightforward. We would therefore recommend that a significant element of car parking is retained on the site as part of any redevelopment, particularly if the redevelopment of the Tesco site brings about a reduction in car parking provision to the north of the town centre. This is, however, likely to constrain the nature of the type and scale of development which could be accommodated on the site.

Site BW4 - Station Gateway



- 5.75 The 'Station gateway' area consists of a number of sites in the vicinity of the intersection of King Street and Rye Piece Ringway. The westernmost site consists of a working men's club building, which fronts onto King Street but has extensive frontage (which is currently not utilized) onto the ring road. The building is of dated appearance and does not contribute to a positive entry point into the town centre. Accordingly therefore it is considered there is potential for the site to be redeveloped to provide for a gateway development which announces the arrival of the visitor to the town centre. It is not recommended that retail is developed on the site, but small-scale office or residential uses may be appropriate, although the limited service provision on the Nuneaton to Coventry rail line may limit any potential demand from commuters⁹.
- 5.76 The site to the south of King Street largely consists of a tract of vacant land fronting the junction with the ring road which has planning permission for residential development, although no implementation of this consent appears to be forthcoming on the site at present. The remainder of the site is currently in use by low-grade retail uses. Should the approved consent be implemented, it will be a positive addition to the area and create an attractive, higher-density corner site. Should the consent lapse we consider that residential uses are best suited to this site.
- 5.77 On the northern side of King Street are a number of further small sites with redevelopment potential. These include the British Queen public house, land adjacent

⁹ We are aware of plans to improve the current service provision at Bedworth rail station, to include extending the current short platforms and improving the frequency of service. However no timescale for the completion of these works is yet available.

to the former Legends premises, and land to the west of Bedworth rail station. If these sites were to come forward, the environment and amenity of the local area will be significantly improved. It is considered there may be some potential for small-scale retail uses fronting onto King Street (such as newsagents, dry cleaners etc), but any redevelopment of these sites is likely to be best suited to residential uses, or small-scale office development.

Site BW5 - Scout Hut site, land off Park Road



5.78 This small site sits between Park Road and Church Street and offers an attractive vista over the small public open space which fronts onto Church Street. The site is accessed via Park Road, to the rear of the new Aldi/Home Bargains development. The site cannot be considered suitable for uses which attract significant volumes of footfall such as retail and leisure, as it is too constrained and divorced from the core areas of these activities in the town centre. However there may be potential to accommodate a small-scale residential scheme at the site (apartment-led) which takes advantage of the setting and proximity to the town centre. The site should not be considered a priority for redevelopment.

Site BW6 - Indoor Market & south of Congreve Walk



5.79 This large parcel of land comprises the existing indoor market to the west of the primary retail area, and a block of units largely given over to retail use bounded by Church Way to the south and west, Congreve Walk to the north, and All Saints Square

to the east. This block of units is of poor quality and very little architectural merit, with the buildings and shop fronts mostly appearing tired and dated, particularly those fronting onto Congreve Walk. The majority of this site (both the market and the retail premises) is owned by NBBC, which therefore raises the potential for it to be brought forward for development in the medium term.

- 5.80 The scale and location of this site, at the heart of the centre, makes its future development of central importance to the future of the centre. Any redevelopment of the site should be of a quality to reflect the profile of its location and the quality of development nearby, including the almshouses. Retail-led development will be most suitable, given the site's location with the core retail area, although alternative uses may be provided for in those aspects of the site facing Church Way, if the market is to be moved away from there.
- 5.81 Retail units should be of a larger footprint than is currently provided for, and the need for a strong anchor store (to replace the vacant Woolworths) is emphasised. It is not envisaged that any further convenience retail floorspace of a significant scale will need to be provided for.
- 5.82 Consideration will also need to be given as to the future of the town's market. This is considered to be a driver of footfall in the town centre and therefore should be retained, although there is sufficient space in areas such as All Saints Square and King Street for this to be accommodated if required, particularly if new development is designed with the purpose of enabling the market to use this space.
- 5.83 With much of this site already in retail use, the net increase in floorspace that new development would provide is unlikely to be significant and could fall within the identified requirement for the plan period. However, the likely timescales required to achieve vacant possession of the site, mean that development is unlikely in the short term. Undoubtedly, a qualitative need exists for improved retail floorspace (i.e. the provision of larger, modern units) and this site represents the best means of achieving this, along with a step change in the environmental quality of the centre. This, in turn, is likely to attract additional retailer demand and reduce overall levels of vacancy.

6 VISIONS & OBJECTIVES

Introduction

- 6.1 Having assessed the capacity for additional development of town centre floorspace in Nuneaton and Bedworth town centres; considered qualitative aspects of each of the town centre's offer; analysed the performance of the two centres, including the causes of under-performance; and identified the assets and opportunities with which can be utilised in improving performance, it is appropriate to join these strands together in by establishing an overarching vision for each of the centres, along with a series of SMART objectives that will deliver them. The visions and objectives will guide the development of spatial framework options and options for projects that will address the causes of under-performance and bring each town assets to bear in driving improved performance. These visions and objectives, set out below, refresh and refine several existing visions for each centre, for the purposes of guiding future development of town centre uses.

Devising the Visions & Identifying Objectives

- 6.2 In order to establish whether the existing visions and objectives for each town were fit for the purpose of guiding future development of town centre uses, a workshop was held on 28th September 2009 at Nuneaton Town Hall comprising approximately 50 stakeholders in the town centres, including local businesses, property agents, elected members, Council officers and others. The workshop considered the current performance and causes of it, the assets and opportunities of each town and projected future demand for development (as set out previously in this report), prior to considering visions and objectives within this context.

- 6.3 The 2004 Arup Masterplan, which sets out the existing regeneration framework for Nuneaton and Bedworth town centres, put forward a vision for Nuneaton town centre to be:

'The main urban hub for the Borough, supporting and attracting greater numbers of people to live, work and visit the town centre. The public squares and pedestrian routes will weave the town centre's environment, heritage and uses together to create local distinctiveness, and vibrancy across all areas at all times',

- 6.4 For Bedworth, the Masterplan set out a vision to:

'Celebrate and draw upon its wealth of community assets as an essential function of the town centre. These often 'hidden' assets provided by the green space of Miners' Welfare Park and cemetery, the public squares surrounded by high quality buildings,

its pedestrian scale and leisure attractions will form the centre of a successful market town that is capable of retaining and recapturing local services.'

6.5 The Council's emerging Borough Plan sets out a joint vision for the development of the two town centres, with Objective 4 of the Borough Plan being to *'continue to develop Nuneaton and Bedworth town centres so they each have a distinctive and individual role in serving the Borough'*. Nuneaton town centre should be developed as *'a regional strategic centre in line with the Regional Spatial Strategy'*, whilst the objective for Bedworth is encouraging *'new housing and leisure uses in Bedworth town centre to complement and support existing facilities'*.

6.6 The Nuneaton and Bedworth Town Centre Partnership meanwhile sets out a series of nine objectives for Nuneaton and Bedworth:

- 1. To strengthen Nuneaton's current retail/leisure provision, providing new office developments and ensure its further development as a sub regional centre*
- 2. To develop Bedworth as a vibrant visitor destination, whilst promoting it as a convenience location for local residents*
- 3. To offer a package to ensure we have a 'one stop' destination for shopping, leisure, recreation and tourism*
- 4. To promote customer service excellence amongst all service providers*
- 5. To provide easy access into and around the centres for all utilising all forms of transportation*
- 6. To create a safe and secure town centres, during the daytime and at night for shoppers, visitors, workers and residents*
- 7. To build a sense of civic pride by creating an attractive, pleasant and distinctive town centres environment cared for by all.*
- 8. To provide a range of town centre housing for the community's needs, working to ensure that local needs for service provision in the town centre are met.*
- 9. To develop a cultural policy*

6.7 There are, therefore, several different visions and objectives for each of the town centres with little coherence between them. The workshops were encouraged to consider the fitness for purpose of these existing visions and, where appropriate, build on and refine them. Where it was considered a new vision was required, the workshop sought to establish the key elements of new visions for the centres and objectives that will deliver them.

6.8 Workshop attendees were reminded of several guiding principles in devising visions and objectives as follows:

- A 'Vision' should give an indication of what the town wants to become (or remain) and suggest why;
 - It should refer back to the evidence base - the performance analysis;
 - It should set out what will be gained for whom;
 - Demonstrate how delivering the vision will capture identified demand;
 - Show how will it solve the causes of problems and deliver the benefits you are looking for;
 - Identify the assets and opportunities it will capitalise on;
 - Be ambitious, yet realistic and deliverable.
- 6.9 The objectives must be practical steps towards achieving the vision. Objectives should ideally be SMART: Specific; measurable; achievable; realistic; and time-bound
- 6.10 Following the workshop, the consultant team collated, reviewed and refined the comments made and the ideas generated at the event. We set out below, a new vision for each of the centres based on the discussions held and relating back to the evidence base, as well as a number of objectives which, if achieved, will see the visions delivered.

The Vision and Objectives for Nuneaton

- 6.11 We propose the following vision for Nuneaton:
- Nuneaton - The Midlands' best market town - where shoppers, workers and residents come together to enjoy the diverse retail and leisure opportunities, the Anker riverside and George Eliot Park; and where businesses choose to locate because of the quality of the workforce, connectivity and high quality premises.*
- 6.12 This vision should be supported by the following proposed objectives:
- *A thriving town centre residential community*
 - *A diversified retail offer with more local independent stores*
 - *An opened-up riverside lined with high quality development, taking advantage of its amenity benefits*
 - *A range of day and evening time dining and leisure venues*
 - *Improved integration of the park and the core of the centre*
 - *A 'critical mass' of office development and office-based businesses*
 - *An improved gateway to the town centre*

The Vision and Objectives for Bedworth

6.13 The following vision for Bedworth town centre is proposed:

Bedworth is a connected shopping, service and leisure destination that surpasses the needs and aspirations of its residents, and is widely renowned for its' civic, cultural and parkland assets.

6.14 It was commented at the stakeholder event that the existing Masterplan vision for Bedworth centre, as set out at paragraph 6.4, does however essentially remain 'fit for purpose', and the Council may prefer to continue with this vision. We concur that the existing vision can be considered acceptable and effectively distills the aspirations of the Council and stakeholders for the town centre.

6.15 We propose the following objectives are introduced to supplement whichever vision the Council chooses to progress with:

- *Attractive, safe and convenient routes into and within the centre, and between all of the town's key assets*
- *High quality retail premises and significantly reduced vacancy*
- *Increased profile and usage of the Civic Hall and Miner's Welfare Park, including a bigger and better programme of activities*
- *First-class public realm including a new focal point for the centre*
- *Significantly increased number of people using the town centre in the day and evening-time*

7 SPATIAL FRAMEWORK & PROJECT OPTIONS

Introduction

- 7.1 Building on the visions and objectives identified in the previous section of the report, set out below are options for spatial frameworks for each of the centres. These frameworks aim to interpret the visions and objectives in a spatial and geographical way, identifying areas for different types of development. Also set out below is a consideration of how each of the opportunity sites identified previously, along with other interventions, could be developed (in terms of uses) in accordance with the each spatial framework option, in order to deliver the identified visions and objectives.

Nuneaton

Spatial Framework Options

Option 1 - 'Quarters'

- 7.2 The 'Quarters' option identifies a number of areas within the centre where certain uses can be considered best suited in order for the centre to be fully integrate and function successfully. The quarters are as follows:
- Retail core - the existing primary retail area, including the Ropewalk and Abbeygate Shopping Centres, Queen's Road and Abbey Street;
 - Retail expansion - areas bordering the retail core which could be redeveloped for retail uses in order to meet the identified comparison goods floorspace requirement;
 - Retail warehousing - north of Newtown Road, including the existing Asda food store and adjacent units;
 - River Corridor - stretching along the spine of the River Anker through the town centre;
 - Office Quarter - land between Church Street and the Ring Road;
 - Station Gateway - land between Nuneaton rail station and the Ring Road.
- 7.3 This spatial framework option would enable the development of a 'critical mass' of office uses by focusing development in a single location at which a 'brand' and identity can be build. Land to accommodate the projected requirement for additional retail floorspace is identified immediately adjacent to the existing retail core so that new development would capitalise on the activity and the vitality of the existing core whilst also enabling the activity it generates to spill directly into the core of the town centre. Residential and leisure uses, for which attractiveness and amenity are of greatest

importance and deliver greatest value uplifts, are focused along the river corridor and areas around the park where the attractiveness and amenity is highest. The existing cluster of retail warehousing is recognised and opportunities to improve connectivity with the core of the centre through redevelopment and reconfiguration could be taken forward. Finally, new development at the gateway could serve to create an attractive, active and interesting route from the station into the heart of the centre. Retail and office-focused areas would be more active during the day, whilst in the evening leisure and residential areas would come alive.

Option 2 - 'Gateways'

7.4 The 'Gateways' option focuses on ensuring that the entry points to the centre for its users present a high quality first impressions of the centre. New development would be focused at the junctions of ring road with: Bond Street; Leicester Road; Wheat Street; Church Street; Coton Road; Queens Road; Abbey Street; and Corporation Street.

7.5 At each of these key gateway locations, development opportunities would be sought and exploited to deliver high quality mixed use development. Active ground floors of retail and leisure uses (including cafés, restaurants and the like) would draw users into the core of the centre. Above this residential and office developments would increase the number of people living and working in the centre and, most importantly, spending their money there. This kind of mixed use development is likely to lead to increased activity across all parts of the centre, during the day and evening.

Implications for development of identified sites

7.6 In Section 5 we identified a total of 15 sites which have redevelopment potential. We set out below how these sites would be developed under the 'Quarters' and 'Gateways' models:

Category A sites - priorities for redevelopment

Site ref	Site name	Development under Option 1 ('Quarters')	Development under Option 2 ('Gateways')
A1	Church Street / Vicarage Street	The site falls within the 'Office Quarter', and as such is suitable for office-led development, although other complementary uses such as a hotel and re-provision of the library may also be appropriate. Any development should present active frontages, comprising retail or leisure uses, to Wheat Street and Church Street.	This site spans the gateways from Wheat Street and Church Street and its scale and location make it a key site. A mix of retail and leisure uses at the ground floor providing active frontages to Wheat Street and Church Street as a minimum, with offices and/or residential above would be suitable under this option. Again, hotel uses and library

			re-provision may also be appropriate. The quality of design and development should signpost arrival in the centre.
A2	Bus Station and surrounding environs	The site falls within the 'River Corridor' quarter; it is considered residential and leisure uses which take advantage of the waterside setting should be developed in this location. If the bus station remains in this location, it should be reconfigured, rationalised and pushed to the west and south of the site with leisure and residential uses introduced on the remainder, capitalising on the riverside.	The site forms the gateway to the town centre when arriving from the rail station. Active frontage retail and leisure uses are required at the ground floors of Bond Street, Newtown Road, and Harefield Road, with a mix of offices and/or residential uses above. To create the active frontage at Harefield Street, the rationalised bus station would be located at the riverside, further east than with Option 1.
A3	Land at junction of Abbey Street and Roanne Ringway	The site occupies a prominent position but is divorced from the town centre by the Roanne Ringway. As such the site can accommodate secondary uses which require proximity to the town centre and will contribute to its vitality and viability, but cannot occupy more central and more expensive space. Such uses might include community facilities, visitor attractions, a nightclub, managed workspace or studio space for creative industries although the Council's view is that some of these uses may not be acceptable in proximity to residential areas. As such residential development may be preferable.	In order to create a gateway to draw people into the centre from Abbey Street, a development comprising ground floor retail or leisure uses with apartments or offices above would be required. This will provide activity and visual interest at ground floor and link in with town centre uses on Abbey Street inside of the ring road to the east.

Category B sites - longer-term priorities

Site ref	Site name	Development under Option 1 ('Quarters')	Development under Option 2 ('Gateways')
B1	Abbey Street surface car park	This large site provides an excellent opportunity to extend the retail core of the town centre as a result of its proximity to the primary shopping area. Development under this option would be retail-led and go some way to meeting the town's comparison goods floorspace requirement	Again, this site spans two gateways - Abbey Street and Queens Street. The scale of the site provides opportunities for a broad mix of uses, although retail may be the largest component, particularly to the south of the site (Queens Road frontage). To the north of the site, office or residential

		over the period to 2026. A decked/multi-storey car park, to replace spaces lost to development, may also be required as part of any redevelopment.	uses may be more appropriate given the distance from the primary shopping area, although active frontages to Abbey Street and New Century Way should be provided. Again, a decked/multi-storey car park may also be required.
B2	Project Victoria	The 'Project Victoria' is located adjacent to the existing Ropewalk Shopping Centre in the area identified under Option 1 for expansion of the retail core. Therefore, development of this site under this option would be very much retail-led and is well placed to accommodate the projected demand for additional comparison retail floorspace. Complementary leisure and office uses may also be suitable.	Under Option 2, the site should be comprehensively redeveloped for a mixture of uses, including retail units fronting Queens Road (and perhaps also Dugdale Street), with complementary development of offices and residential above and elsewhere on the site.
B3	Former Post Office / Wilkinsons site, Church Street	The site falls within the 'Office Quarter', and as such is suitable for office-led development, although retail units should be provided on the Church Street frontage to provide 'anchor tenants' at the eastern end of the shopping area (the role played by Wilkinsons at present) in order to continue to attract high levels of pedestrian footfall.	In order to create a high quality gateway at this location, well designed development of retail uses fronting both Church Street and Wheat Street would be required. Upper floors, if developed, are more likely to be suited to office uses than residential uses, although both would be acceptable.
B4	Asda store and retail warehouses, Newtown Road	The area should continue to be used for larger-format retail provision, although opportunities to improve connectivity with the core of the centre through redevelopment and reconfiguration could be taken forward, particularly in respect of the Asda store which would be more beneficially located to the south of the site closest to the Newtown Road frontage.	
B5	Land at Abbey Street / High Street	The small site has little frontage onto Abbey Street and is most suitable for residential uses that will increase the catchment population and expenditure of the centre.	Under Option 2, development of the site for retail uses at ground floor with residential above, in order to better define the gateway to the town centre.
B6	Coton Road	This site is located in the area identified as riverside residential and leisure corridor. A residential-led development that meant more people living and spending their money in the centre would be most suitable under this option.	Under option two a wider mix of uses including offices and retail (at ground floor), in addition to residential uses, would be suitable.

Category C sites - infill sites with redevelopment potential¹⁰

Site ref	Site name	Development under Option 1 ('Quarters')	Development under Option 2 ('Gateways')
C1	St Mary's Road Depot	The site falls outside of the main town centre and is therefore not suitable for uses such as retail, leisure or (office-based) employment, but can be considered appropriate for residential or lower-density employment uses. The relatively constrained access to the site through a residential area means that development which generates significant volumes of vehicular traffic would not be appropriate on the site.	
C2	Land east of the Town Hall	The site is located in the Riverside Corridor quarter and as such most suitable for uses that take advantage of the riverside setting, including housing and leisure uses. Offices or retail may also be suitable.	As the site is located away from any of the principal gateways/access points into the centre, retail and leisure uses would not be directed to this site. Rather, residential or office development would be sought under this option.
C3	Multi-storey car park, Newtown Road/Harefield Road	It is unlikely that redevelopment of this existing multi-storey car park would be viable. Indeed, it may not be desirable, in terms of parking provision across the centre. However, if additional land for retail development was required (and values justified comprehensive redevelopment), the site could provide additional larger modern retail units fronting Harefield Road. It is likely that car parking would be required on upper floors if this is possible in access and design terms. A more minimal scheme, converting part of the ground floor parking area to retail units fronting Harefield Street, would also be suitable.	Subject to viability and desirability issues mentioned in respect of Option 1, under Option 2 a more mixed scheme comprising office, retail, or leisure development (taking advantage of the proximity to site A2) would be suitable. Again, it is likely that re-provision of car parking would also be required on site.
C4	Retail warehouses, Back Street	The site forms part of the 'Station Gateway' Quarter which could accommodate a new bus station, if it were to be re-located from its current site. The site would be an excellent alternative, enabling the entirety of site A2 to be developed for town centre uses and better co-location	Subject to the potential for relocating the bus station mentioned in Option 1, the 'gateways' options would see the site developed with active retail and leisure uses fronting Bond Street, Leicester Street and Back Street. Upper floors could comprise offices or residential uses.

¹⁰ These are additional sites which have been brought to our attention by the Council; the site areas are generally smaller and represent more piecemeal development opportunities than the Category A and B sites but nevertheless represent important opportunities to bring forward new development in the town centre. Applications for development at these Category C sites should be treated individually on their own merits.

		and integration of bus and train facilities. Whether this happens or not, Bond Street remains a key route into the centre from the station and as such should be lined with active retail and leisure uses. To emphasise the importance of the route, development should include upper floors that would be best used for offices, taking advantage of the accessibility and connectivity afforded by the nearby transport hubs.	
C5	Surface car park, Orchard Street	Under Option 1, development of this site should take advantage of proximity to the adjacent Criminal Justice Centre through development of offices as they are likely to be attractive to legal and professional services firms. Such businesses often prefer townhouse-type offices with their own front door rather than large floorplate multi-tenant spaces.	In order to define the gateway and draw people down Wheat Street some ground floor retail uses at the junction with Vicarage Street may be appropriate with offices and/or residential uses on upper floors and elsewhere on the site.
C6	Land to the rear of Newdegate Street	Redevelopment of this site is difficult, given its long narrow shape and that access is required for servicing of retail units. It also has very little profile or frontage. If development is possible, residential, leisure and office uses would be suitable.	
C7	Back Street/ Bond Street	Planning permission exists for residential-led development of a significant scale (6-7 storey) also including retail and office uses	
C8	Rear of Abbey Street & Burgage Place	This site is located in the area identified for retail expansion, although it currently has poor pedestrian access and little profile. Its development for such uses could only be achieved if brought forward in conjunction with the Halfords unit to the north. Otherwise residential or office development may also be suitable.	This site is not located at a gateway into the centre and as such would not be a priority under this option. Development for office or residential use is likely to be most suitable, if comprehensive change is to occur.

Other projects

7.7 In addition to the development projects discussed above, the workshop with key stakeholders in Nuneaton Town Centre identified some additional projects that could assist in achieving the objectives sought and improving the performance of the centre, subject to further consideration of their feasibility, costs and benefits. Such projects include:

- More regular and different markets (farmers, art & craft, food & drink, antiques, etc) to drive increased vitality, diversity and activity to the centre;
- Open up and tidy up the River Anker so that it is more attractive and adds more amenity value to potential development sites around it;
- Longer park opening times and improved profile and access into it so that people spend more leisure time in and close to the town centre;
- A new plaza or focal area of high quality public realm; and
- Later opening hours for shops and car parks.

7.8 Other projects considered, but thought not to deliver adequate benefits or to be effective in delivering one or more of the objectives include:

- Address traffic problems on the ring road by either make it one-way or through new infrastructure that enables through traffic to more effectively bypass the centre (subject to feasibility); and
- Move the bus station to site C4 to create an integrated transport interchange.

Bedworth

Spatial Framework Options

Option 1 - 'Quarters'

7.9 The first option identifies three distinct functional areas within the centre, the character and functionality of which could be enhanced through new development and other interventions. The framework plan identifies a shopping heart for Bedworth that includes All Saints Square, covered market and (redeveloped) Tesco store; a business quarter stretching from King Street to Bedworth rail station; and the area to the south of Rye Piece Ringway for leisure and recreation.

7.10 Dividing the town centre into functional areas in this way will guide development of certain types and other interventions in order that their functionality can be improved. By focusing retail uses in the shopping heart, it is intended that a critical mass will be delivered. The business quarter builds on an existing cluster of offices and the accessibility afforded by the train station - new development of good quality small scale office/business accommodation could complement this. To the south of these areas, are some of the towns key leisure and recreation assets, and development or interventions to support this could drive increased usage and profile of these assets. Outside of these 'quarters' is the town's residential hinterland from which much of the expenditure and activity in the centre is derived. If more people can be encouraged to

live close to the centre, then the centre will clearly benefit from increased levels of expenditure.

- 7.11 However, in order to encourage more people to spend more time and money in the centre, there is a need to address issues around the environmental and design quality in some parts of the centre. In particular, the retail development along the western frontage of All Saints Square is particularly unattractive, to the extent that many retailers would not want to locate there. This area may need to be the focus for any intervention.

Options 2 - Consolidate & Re-Focus - Description & Rationale

- 7.12 Option 2 seeks to consolidate and refocus the provision of town centre uses in the centre into an area stretching from Tesco to the north to the Civic Hall in the south, and from the Market in the west as far as Croxhall Street in the east. A more compact retail core will mean a greater intensity of footfall and activity, from which all town centre businesses will benefit, rather than the current highly dispersed pattern where activity is dissipated and users of the centre simply utilise one aspect of the centre's offer before leaving. In order to consolidate the provision of town centre uses, this approach would see a policy framework that discourages and prevents new development of, changes of use to, town centre uses outside of the defined core area. It would also proactively promote the conversion of existing town centre uses outside of the core area to residential or other non town centre uses.
- 7.13 Refocusing the centre will require safe, attract, direct and active routes from all of the major drivers of activity in the centre to the heart of the centre. These drivers of activity include the soon-to-be redeveloped Tesco store to the north, the train station to the east, the Civic Hall and Miners' Welfare Park to the south and Aldi, Home Bargains and the Market to the west. At the centre of these is the confluence of All Saints Square, King Street and High Street which, with investment in the public realm, could be a new focal point for the centre. Routes to this focal point are good from the north, east and south (although could be improved further though investment in public realm), but not from the west, where the route to the focus is indirect and unattractive. In order to create a direct and high quality route linking the Market and Aldi/Home Bargains development to the west with core of the centre, and to bring the activity they generate into it, redevelopment of at least part of the block forming the western frontage to All Saints Square may be required.
- 7.14 Outside of the consolidated area of retail and other town centre uses, development opportunities should be exploited to increase the local residential population and the

resulting amount of expenditure directed towards retail and leisure outlets in the town centre.

Implications for development of identified sites

7.15 In Section 5 we identified a total of 5 sites which have redevelopment potential. We set out below how these sites would be developed under the 'Quarters' and 'Consolidate and refocus' frameworks:

	Site name	Development under Option 1 ('Quarters')	Development under Option 2 ('Consolidate & Re-Focus')
BW1	Land at George Street Ringway / Margaret Avenue	This site falls within the wider 'residential hinterland' of the town centre and as such is best suited for residential purposes. This will increase the catchment population of the town centre, improving its viability and vitality.	The site falls outside the consolidated town centre core, and therefore is best suited for residential purposes. This will increase the catchment population of the town centre, improving its viability and vitality.
BW2	Arc Car Wash, Leicester Street	This site also falls within the 'residential hinterland' and it is considered a reasonably high-density residential-led development could be accommodated at this site, which should act as a town centre gateway. Retail may be appropriate on the ground floor if the vacancy rate in the 'shopping heart' improves. This will also assist in increasing the residential population of the town centre.	The site falls outside the consolidated town centre core, and therefore any provision of retail or other town centre uses at this site would be resisted under this option. Rather, residential development (preferably apartments given the scale of the site and the need for further diversity in the local housing offer) that would drive increased catchment population and expenditure would best deliver this framework option.
BW3	Surface car park, rear of High Street	The site falls within the 'Leisure and Recreation' Quarter and as such development which helps to sustain and enhance this functionality, such as restaurants, bars or cafés would be acceptable, along with residential units above. However, this site is the main car park serving the south and east of the centre and it is considered that retention of a similar level of parking as currently provided is desirable, which is likely to mean the viability of any development as described above is questionable.	The site falls outside the consolidated town centre core, and therefore any retail provision at this site would be resisted under this option. Given the value of this car park in serving the south and east of the centre, it is considered that it's retention in its current use would be most favourable under this option.

BW4	Station Gateway	The site falls within the 'Business Quarter' in Option 1, which stretches from King Street to Bedworth rail station. As such, both corner sites are appropriate for high-quality office accommodation of a limited scale.	The site falls outside the consolidated town centre core, and therefore any development of town centre uses should be resisted. Residential development would be most appropriate in this location under Option 2.
BW5	Scout Hut site	The site is within the residential hinterland of the town centre and it is considered this is the most appropriate use.	The site falls outside the consolidated town centre core, and is considered best suited to residential uses.
BW6	South of Congrave Walk & covered market	Under either option, this site would see retail-led development, given its location at the core of the centre. Complementary leisure/food & drink uses would also be suitable and there may also be potential for residential uses at upper floors. Office uses may be suitable, subject to consideration of whether allowing such development would draw demand harmfully away from Nuneaton.	

Other projects

7.16 In addition to the development projects discussed above, the workshop with key stakeholders in Bedworth Town Centre identified some additional projects that would assist in achieving the objectives sought and improving the performance of the centre. Such projects include:

- Shop-front improvement scheme;
- Town centre public realm investment;
- A traffic management scheme and improved transport infrastructure;
- Additional community facilities such as an adult education centre or community arts facility;
- More regular rail services; and
- A marketing and promotion campaign

8 DELIVERY

Introduction

8.1 This section of the report sets out how the identified demand for additional floorspace for comparison retail, offices and leisure uses can be delivered on the identified sites through consideration of their development capacity. It also identifies the timescales within which development of each site could take place and who the lead delivery organisation(s) are likely to be. Finally, this section also provides a risk assessment of the spatial framework options to enable conclusions to be drawn as to their deliverability.

Development Capacity

8.2 The tables below sets out broad estimates for the amount of floorspace, by type, that might be accommodated on each of the identified sites under each spatial framework. In order to calculate development capacity, assumptions have been made in respect of the likely site development density and the number of storeys, based on our experience of developments that are of a similar scale, nature and use elsewhere, as well as consultations with property agents. Clearly, however, future developers of each of these sites will have their own views as to how much development of which types could and should be accommodated on them and as such, these figures should be treated as being indicative only.

8.3 The floorspace figures provided below are gross. Typical gross to net ratios are:

- 70% for comparison retail and food & drink uses;
- 90% for offices
- 85% for residential (apartments)

8.4 Where residential uses are shown, it has been assumed that these are apartments rather than houses, unless stated.

8.5 Where sites have similar characteristics, the same assumptions have been made in respect of development densities and the number of storeys. Where necessary and dictated by the characteristics of the site, variations have been made. The split in both percentage and floorspace terms between each use at each site is broken down in the tables, based on an interpretation of the 'Implications for Development of Identified Sites' set in Section 7 above.

8.6 Due to the generally smaller size and greater uncertainties as to the likelihood and timescales for their development, sites in the C classification have not been subject to capacity assessment.

Nuneaton

Site ref	Site name	Development under Option 1 ('Quarters')	Development under Option 2 ('Gateways')
A1	Church Street / Vicarage Street *assumes 60% site development density and 4 storeys.	Site Area - 1.655ha Development capacity: 39,120sq. m Of which: Offices - 60% (c23,500sq. m) Hotel - 15% (c5,850sq. m) Library - 10% (c3,900sq. m) Retail - 10% (c3,900sq. m) Food & drink - 5% (c1,950sq. m)	Site Area - 1.655ha Development capacity: 39,120sq. m Of which: Offices - 25% (c9,800sq. m) Hotel - 15% (c5,850sq. m) Library - 10% (c3,900sq. m) Retail - 15% (c5,850sq. m) Food & drink - 10%(c3,900sq. m) Residential - 25% (c9,800sq. m)
A2	Bus Station and surrounding environs *assumes 30% of site used for bus sta, 50% site development density and 4 storeys on remainder	Site Area - 0.948ha Development capacity: Bus Station - 2,850sq. m Remainder - 13,250sq. m Of which: Retail - 10% (c1,325sq. m) Food & drink- 15% (c2,000sq. m) Residential - 75% (c9,950sq. m/ 120 units)	Site Area - 0.948ha Development capacity: Bus Station - 2,850sq. m Remainder - 13,250sq. m Of which: Offices - 40% (c5,300sq. m) Retail - 20% (c2,650sq. m) Food & drink- 20% (c2,650sq. m) Residential - 40% c (5,300sq.)
A3	Abbey Street/Roanne Ringway *assumes 60% site development density and 4 storeys	Site Area - 0.267ha Development capacity: 6,400sq. m Of which: Retail - 15% (950sq. m) Food & drink- 5% (c300sq. m) Residential - 80% (c5,120sq. m)	Site Area - 0.267ha Development capacity: 6,400sq. m Of which: Offices - 35% (2,250sq. m) Retail - 20% (c1300sq. m) Food & drink - 5% (c300sq. m) Residential - 40% (2,550sq. m)

Site ref	Site name	Development under Option 1 ('Quarters')	Development under Option 2 ('Gateways')
B1	Abbey Street surface car park *Assumed 40% of site for MSCP (4 storey). 70% development density on remainder	Site Area - 1.196ha Development capacity: MSCP - 19,100sq. m Remainder - 5,025sq. m (footprint) Of which: (@2 storeys) Retail - 90% (9,050sq. m) Food & drink -10% (1,000sq. m)	Site Area - 1,196ha Development capacity: MSCP - 19,100sq. m Remainder - 5,025sq. m (footprint) Of which: (@ 3.5 storeys ave.) Offices - 30% (c5,300sq. m) Retail - 40% (c7,000sq. m) Food & drink - 5% (c880sq. m) Residential - 25% (4,400sq. m)
B2	Project Victoria Assumes 70% site development density (minimal, if any on-site	Site Area - 1.067ha Development capacity: 7,450sq. m (footprint) Of which: (@2 storeys ave.) Retail - 90% (13,450sq. m)	Site Area - 1.067ha Development capacity: 7,450sq. m (footprint) Of which: (@3.5 storeys ave.) Offices - 30% (c7,800sq. m)

	parking)	Food & drink- 10% (c1,500sq. m)	Retail - 35% (c9,100sq. m) Food & drink - 5% (c1,300sq. m) Residential -30% (c7,800sq.)
B3	Former Post Office / Wilkinsons site, Church Street Assumes 70% site development density and 4 storeys	Site Area - 0.387ha Development capacity: 10,850sq. m Of which: Offices - 80% (8,700sq. m) Retail - 20% (c2,,250sq. m)	Site Area - 0.387ha Development capacity: 10,850sq. m Of which: Offices - 50% (c5,600sq. m) Retail - 20% (c2,,250sq. m) Food & drink - 5% (c550sq. m) Residential - 25% (c2,800sq.)
B4	Asda store and retail warehouses, Newtown Road	Site Area - 4.493ha Development capacity: c18,000sq. m, mostly replacement of existing supermarket and retail warehouses, but options too multitudinous to estimate	
B5	Land at Abbey Street / High Street Assumes 60% site development density and 4 storeys	Site Area - 0.073 Development capacity: 1,750sq. m Of which: Residential - 100% (1,750sq. m)	Site Area - 0.073 Development capacity: 1,750sq. m Of which: Retail - 25% (c450sq. m) Residential - 75% (c1,300sq. m)
B6	Coton Road Assumes 60% site development density and 4 storeys	Site Area - 0.198 Development capacity: 4,750sq. m Of which: Residential - 100% (4,750sq. m)	Site Area - 0.198 Development capacity: 4,750sq. m Of which: Retail - 20% (c950sq. m) Offices - 40% (c1,900sq. m) Residential - 40% (c1,900sq. m)

8.7 The table above shows that under spatial framework Option 1 - Quarters - the following development quanta could be delivered:

- Retail (principally comparison retail): 30,925sq. m
- Food & drink: 6,750sq. m
- Offices: 32,200sq. m
- Residential: 21,570sq. m (equates to broadly 245 units)
- Hotel: 5,850sq. m
- Library: 3,900sq. m

8.8 Option 2 - Gateways could development the following development quanta:

- Retail (principally comparison retail): 29,550sq. m
- Food & drink: 9,580sq. m

- Offices: 37,950sq. m
- Residential: 35,850sq. m (equates to broadly 405 units)
- Hotel: 5,850sq. m
- Library: 3,900sq. m

8.9 These figures compare to projected requirements for additional comparison retail floorspace of 30-35,000sq. m and c30,000sq. m of office floorspace. However, the figures set out at para. 8.7 and 8.8 above do not take account of existing floorspace in these uses that will be lost as a result of the development of the identified sites.

Bedworth

Site ref	Site name	Development under Option 1 ('Quarters')	Development under Option 2 ('Consolidate & Re-Focus')
BW1	Land at George Street Ringway / Margaret Avenue	Site Area - 1.199ha Development capacity: c40 residential units (houses) based on 35 dwellings per ha	Site Area - Development capacity: c40 residential units (houses) based on 35 dwellings per ha
BW2	Arc Car Wash, Leicester Street Assumes 60% site development density and 4 storeys	Site Area - 0.330ha Development capacity: 7,900sq. m Of which: Retail - 25% 2,000sq. m Residential - 75% 5,900sq. m	Site Area - 0.330ha Development capacity: 7,900sq. m Of which: Residential - 100% (7,900sq. m)
BW3	Surface car park, rear of High Street Assumes 60% site development density and 4 storeys	Site Area - 0.175ha Development capacity: 1,050sq. m Of which: Retail - 10% - (c420sq. m) Food & drink- 10% - (c420sq. m) Residential - (c3,360sq. m)	Site Area - Development capacity: N/A
BW4	Station Gateway Assumes 60% site development density and 3 storeys	Site Area - 0.454ha Development capacity: 10,900sq. m Of which: Offices - 50% (c5,450sq. m) Retail - 20% (c2,200sq. m) Food & drink - 5% (c550sq. m) Residential - 25% (c2,750sq. m)	Site Area - Development capacity: 10,900sq. m Of which: Residential- 100% (c10,900sq. m)
BW5	Scout Hut site Assumes 60% site development density and 4 storeys	Site Area - 0.139ha Development capacity: 3,350sq. m Of which: Residential - 100% (3,350sq. m)	Site Area - 0.139ha Development capacity: 3,350sq. m Of which: Residential - 100% (3,350sq. m)
BW6	South of Congrave Walk & covered market	Site Area - 0.680ha Development capacity: 4,100sq. m	

	Assumes 60% site development density and 1 storeys	Of which: Retail - 90% (c3,700sq. m) Food & drink - 10% (c410sq. m)
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8.10 The table above shows that under spatial framework Option 1 - Quarters - the following development quanta could be delivered:

- Retail (principally comparison retail): 8,320sq. m
- Food & drink: 830sq. m
- Offices: 5,450sq. m
- Residential: 45 houses plus 15,360sq. m of apartments (c175 units)

8.11 Option 2 - Consolidate & Re-focus - could deliver the following development quanta:

- Retail (principally comparison retail): 3,700sq. m
- Food & drink: 410sq. m
- Offices: 0sq. m
- Residential 40 houses plus 22,150sq. m of apartments (c250 units)

8.12 These figures compare to projected requirements for in demand for 3,750sq. m - 4,350sq. m of comparison retail floorspace over the plan period. The recent employment land review does not project a requirement for office development for Bedworth, although does state that some development will be 'located in Bedworth and other areas not identified as employment land'. That said, in order to support the emergence and growth of a sustainable office market in Nuneaton, it is recommended that office development be focused there in order not to harmfully dissipate demand and risk achieving critical mass.

8.13 As noted in relation to Nuneaton above, these figures do not take account of existing floorspace in these uses that will be lost as a result of the development of the identified sites, which is particularly relevant in respect of site BW6.

Delivery

8.14 The table below considers, for each of the identified sites, the likely timescales within which they could be developed, taking account of information known about their ownership and intentions to develop; their attractiveness to development and occupational markets and any other potential development constraints that we are aware of.

8.15 For the purposes of the table below, we define short term opportunities as those where development could or is likely to commence within 3 years. Medium term is defined as commencement of development in 3-6 years and longer term opportunities being those likely to come forward after six years.

Nuneaton

Site ref	Site name	Timescale for development	Delivery organisations
A1	Church Street / Vicarage Street	The vast majority of the site is already in public ownership and its location and scale is likely to make it attractive to development in the short to medium term. We are not aware of any other development constraints.	Given the public ownership of the majority of the site (Warwickshire County Council and NBBC), they are likely to be the lead delivery body for development of this site. It is understood that WCC and NBBC are to market the site to find a private development partner for the site.
A2	Bus Station and surrounding environs	The site is owned by NBBC and leased to Stagecoach Warwickshire, who are understood to be co-operative in respect of redevelopment potential, subject to re-provision of (rationalised) station facilities. The site is also likely to be attractive to the market, particularly if the riverside can be improved. That said, any development in this location would have to take account of flood risk issues. Nonetheless, we believe that the site could be developed in the short-medium term.	Clearly, NBBC as landowners and Stagecoach as leaseholders/operators will be the principal delivery partners, although a private sector development partner will be required for the remainder of the site that is to be developed for non-bus station uses.
A3	Land at junction of Abbey Street and Roanne Ringway	Whilst the ownership details of the site are not yet fully known, part of the site is used for parking (operated by NBBC) and the remainder is unused and has been for some time, suggesting that it could be acquired relatively easily. The scale of the site would be attractive to small local and regional developers and, subject to assembly could be developed in the short-medium term.	NBBC are likely to have a key role in delivering this site, as lessees, if not landowners, they will need to signal to the market that the site is available for development.

Site ref	Site name	Timescale for development	Delivery organisations
B1	Abbey Street surface car park	This site is owned by NBBC and as such no assembly is required prior to development. However, re-provision of parking, as necessary will be required and it is likely that the capital cost of this will have to be met through the value of development. Nonetheless, the site is large and well located in relation to the Ropewalk shopping centre and as such is likely to be attractive to the market. There are no other apparent development constraints and as such development in the medium term (once parking issues have been resolved) could be expected.	As sole landowners, NBBC will be the lead delivery body. However, in order to ensure development of the nature sought, it will be necessary to prepare a development brief that will form the basis for marketing of the site and subsequent negotiations with potential private sector development partners.
B2	Project Victoria	This site is close to, and of a similar scale to, the Abbey Street site (B1 above) and shares its attractiveness to the market. However, the site is known to be in multiple ownerships. As such, it is likely to take a number of years to assemble the site. The number of ownerships means that there is a significant likelihood of compulsory purchase procedures being required. As such, this site is unlikely to be developed in the short to medium term, but could well be brought forward in the later years of this plan period.	Clearly, NBBC and its public sector partners (potentially including Coventry Solihull & Warwickshire Partnership, Advantage West Midlands and HCA) will have to take a leading role in funding and justifying any land assembly/compulsory purchase exercise, before identifying a private sector partner to engage in the delivery of development on the site.
B3	Former Post Office / Wilkinsons site, Church Street	Whilst the freehold ownership structure of this site is not fully known, it is clear that there are a number of ongoing tenancies and it can be concluded from this that it would take several years to achieve vacant possession of the site to enable development. Nonetheless, the site occupies a high profile and accessible location likely to be sought after by tenants and developers. The site should be	The freehold owner(s) of the site are best placed to take forward any redevelopment of this site, unless public sector acquisition is possible in terms of available public expenditure and justifiable in terms of the case for it. Nonetheless, NBBC could be proactive in identifying and opening lines of communication with the owner(s) of the site in order to promote the potential for development.

		seen as a medium term development opportunity.	
B4	Asda store and retail warehouses, Newtown Road	The majority of this site is in the ownership of Asda stores, although properties along the frontage to Newtown Road and Bond Street are thought to comprise several leasehold and/or and freehold interests. To assemble this site might take a number of years, particularly if one or two crucial interests remain and can 'held for ransom' by their current owners. As such, this site should be seen as a medium term opportunity.	If proposals to redevelop the site to provide a larger and more modern supermarket, preferably towards the frontage (south) of the site, this would have to be driven by and paid for by Asda. It is unlikely that NBBC or other public sector partners would need to be, or be able to justify, involvement in the delivery of development of this site.
B5	Land at Abbey Street / High Street	The site is understood to be in single private ownership and that the current owners are seeking redevelopment of the site. Planning permission is in place for an apartment and office scheme. We are not aware of any specific development constraints that would prohibit development of the site. As such, it is likely that development of the site could be brought forward in the short term, for either the approved scheme or an alternative scheme.	The lead body in delivering this site is likely to be the site's current owners (or other organisation to who they sell on the site). It is not expected that the Council or other public sector partners will be involved in the delivery of this site.
B6	Coton Road	The site is understood to be in single private ownership of a local development company and that the current owners are seeking redevelopment of the site. Planning permission is currently being sought for a mixed residential, office and retail scheme. We are not aware of any specific development constraints that would prohibit development of the site. As such, it is likely that development of the site could be brought forward in the short term	The lead body in delivering this site is likely to be the site's current owners. It is not expected that the Council or other public sector partners will be involved in the delivery of this site.

Bedworth

Site ref	Site name	Timescale for development	Delivery organisations
BW1	Land at George Street Ringway / Margaret Avenue	The site is a former school and playing fields that is wholly in the ownership of Warwickshire County Council, who are currently marketing the site for development. The only apparent potential development constraint is whether proposals involving the playing fields might be constrained by the need to refer any application to the Secretary of State under Circular 02/2009. Notwithstanding this, the site is likely to be attractive to the market on return to normal conditions in terms of access to debt finance. Assuming playing fields planning issues can be resolved, this site could be developed in the short term.	Depending on the terms under which Warwickshire County Council is disposing of the site, it is likely that the delivery of the site will be led by a private sector developer. Unless the terms of the disposal are particularly prescriptive, it is unlikely that NBBC or other public sector partners will be involved in the delivery of this site.
BW2	Arc Car Wash, Leicester Street	This site is known to be in multiple ownerships and several active uses (although not fully utilised). We are not aware that any of the site's current owners or any third party are seeking to assemble the site for development. The individual ownerships in their own right are unlikely to be attractive to the market, so unless the site is assembled, it is difficult to foresee its development in the short or medium term.	If this site is considered by the Council to be a priority, and a case can be made for it, the site could be assembled by the Council either by agreement or by CPO and subsequently disposed of under terms to a developer partner. This is also likely to require financial assistance from Coventry Solihull & Warwickshire Partnership, Advantage West Midlands and/or HCA.
BW3	Surface car park, rear of High Street	The site is understood to be wholly in the ownership of NBBC, although currently well used for parking. As such, re-provision of parking may be required prior to development. The site is likely to have some level of attractiveness to the development market, although whether values will enable parking re-provision is unclear. The site should be considered to be a medium term opportunity, subject to resolving the parking issue.	Given the Council's ownership of the site, they would be responsible for resolving any issues around the re-provision of parking prior to marketing the site for development. If the site is to be disposed of, we recommend that a development brief is prepared to ensure that any developer partner delivers development of the scale, nature and quality sought.

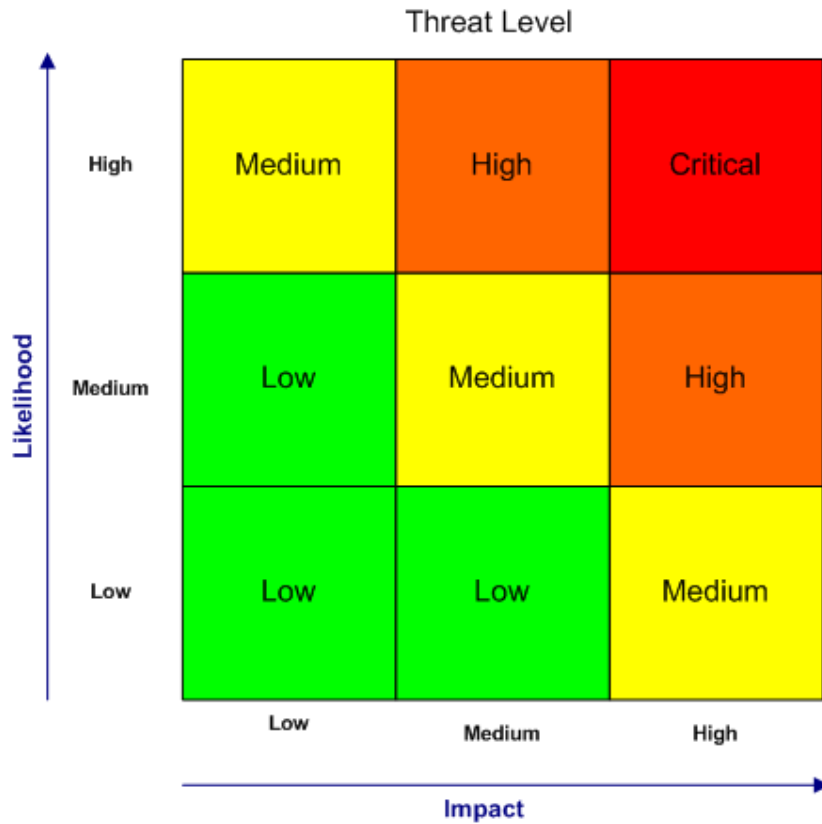
BW4	Station Gateway	The Station Gateway comprises three sites, all of which are in at least one private ownership. Whilst planning permission is in place for residential development on part of one of the sites and as such could be developed in the short term, it is likely that the remainder of the Station Gateway will take longer to bring forward, particularly where there are existing active uses such as the Working Men's Club and should be considered medium or longer term opportunities, particularly in the light of current market conditions.	The owners of the sites are likely to lead delivery of development of these sites. However, if seen as a priority by NBBC, delivery timescales could be shortened by proactive involvement in assembling the sites for development, which would require financial and resource inputs from the Council and its partners.
BW5	Scout Hut site	The site is thought to be in the ownership of the Council, following the relocation of the Scout troop to the Elizabeth Centre and it is understood that the site is currently unused. As such, and in the absence of any other apparent development constraints, it can be considered available for development in the short term. That said, it's scale limits its attractiveness to the development market to smaller local and regional developers of small scale infill sites.	NBBC, as owners of the site, will be responsible for marketing and disposal of the site for development, whilst development itself will be delivered by a private developer.

Risk Assessment

8.16 Below is set out a risk assessment of each of the Spatial Framework options identified for each of the centres. The risks are considered to fall into three categories as follows:

- Delivery risks - that the spatial framework will not be delivered;
- Effectiveness risks - that the spatial framework will not be effective in delivering the vision and objectives sought; and
- Risks of un-intended consequences of adopting the spatial framework

8.17 For each risk, the impact of the risk transpiring and the likelihood of the risk transpiring are considered and used to inform conclusions on the overall level of risk by reference to a standard risk matrix as shown below:



Nuneaton

Spatial Framework Option 1: Quarters

Risk	Impact	Likelihood	Overall
Delivery risks: <ul style="list-style-type: none"> • Risk that the market will not seek to develop the identified sites over the plan period for the uses proposed • Risk that identified sites are not assembled and made available for development over the plan period 	High Medium	Low Medium	Medium Medium
Effectiveness risks: <ul style="list-style-type: none"> • Risk that a town centre residential community will not be created • Risk that the retail offer will not be diversified • Risk that the riverside will not be opened up and capitalised upon • Risk that new dining and leisure opportunities will not be developed • Risk that the integration of the park and the 	Low Medium Medium Low Low	Medium Low Low Medium Medium	Low Low Low Medium Medium

<p>core of the centre will not be improved</p> <ul style="list-style-type: none"> • Risk that development will not deliver a critical mass of offices • Risk that the Gateway to the centre will not be improved 	Medium	Low	Low
	Medium	Medium	Medium
Risk of un-intended consequences:			

Spatial Framework Option 2: Gateways

Risk	Impact	Likelihood	Overall
<p>Delivery risks:</p> <ul style="list-style-type: none"> • Risk that the market will not seek to develop the identified sites over the plan period for the uses proposed • Risk that identified sites are not assembled and made available for development over the plan period 	High	Low	Medium
	Medium	Medium	Medium
<p>Effectiveness risks:</p> <ul style="list-style-type: none"> • Risk that a town centre residential community will not be created • Risk that the retail offer will not be diversified • Risk that the riverside will not be opened up and capitalised upon • Risk that new day and evening time dining and leisure opportunities will not be developed • Risk that the integration of the park and the core of the centre will not be improved • Risk that development will not deliver a critical mass of offices • Risk that the Gateway to the centre will not be improved 	Medium	Medium	Medium
	Medium	Low	Low
	Medium	Medium	Medium
	Low	Low	Low
	Low	Low	Low
	Medium	High	High
	Medium	Low	Low
Risk of un-intended consequences:			

Bedworth

Spatial Framework Option 1: Quarters

Risk	Impact	Likelihood	Overall
<p>Delivery risks:</p> <ul style="list-style-type: none"> • Risk that the market will not seek to develop the identified sites over the plan period for 	Medium	Medium	Medium

<p>the uses proposed</p> <ul style="list-style-type: none"> • Risk that identified sites are not made available for development over the plan period 	High	Low	Medium
<p>Effectiveness risks:</p> <ul style="list-style-type: none"> • Risk that attractive routes between the centre's assets will not be created • Risk that high quality retail premises and reduced vacancy will not be achieved • Risk that the Civic Hall and Miner's Welfare Park will not benefit from increased profile and usage • Risk that poor public realm and lack of a focal point will deter shoppers • Risk that new development will not encourage increased daytime and evening use of the centre 	Medium	Medium	Medium
	High	Medium	High
	Medium	Medium	Medium
	Medium	Medium	Medium
	Medium	Low	Low
Risk of un-intended consequences			

Spatial Framework Option 2: Consolidate & Re-focus

Risk	Impact	Likelihood	Overall
<p>Delivery risks:</p> <ul style="list-style-type: none"> • Risk that the market will not seek to develop the identified sites over the plan period • Risk that identified sites are not made available for development over the plan period 	Medium	Medium	Medium
	High	Low	Medium
<p>Effectiveness risks:</p> <ul style="list-style-type: none"> • Risk that attractive routes between the centre's assets will not be created • Risk that high quality retail premises and reduced vacancy will not be achieved • Risk that the Civic Hall and Miner's Welfare Park will not benefit from increased profile and usage • Risk that poor public realm and lack of a focal point will deter shoppers • Risk that new development will not encourage increased daytime and evening use of the centre 	Medium	Medium	Medium
	High	Medium	High
	Medium	Medium	Medium
	Medium	Low	Low
	Medium	Low	Low
Risk of un-intended consequences:			

• Risk that office development would draw demand from Nuneaton and harm achievement of the Vision for it	Medium	Medium	Medium
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9 CONCLUSIONS & RECOMMENDATIONS

Conclusions

Nuneaton

- 9.1 The two spatial framework options for Nuneaton comprise very different approaches and would have very different outcomes. The 'Quarters' framework would re-enforce the retail core, whilst providing ample space to accommodate projected future requirements for comparison floorspace. It would also enable the office quarter to develop its own brand and identity as a location for business capitalising on the criminal justice centre, proximity to which will be attractive for several office based sectors. It also makes maximum benefit of the river corridor by focusing development of uses that will derive increase value from it. However, some initial (and most likely public sector) investment in cleaning up and opening up the corridor (along with any necessary flood alleviation works) is likely to be necessary if this approach is taken.
- 9.2 The 'gateways' framework takes a very different approach. It seeks to attract users into the core of the centre by ensuring that the routes into it are lined with development and uses that will engage pedestrians. It would be allied to investment in public realm to improve connectivity across the ring road and into the centre, again led by the public sector. It seeks a genuine mix of uses (both horizontally and vertically) in each part of the centre that maximises sustainability and, hopefully, minimises the need to travel. It relies on the co-ordination of the various elements to give the sense of critical mass for each development sector in the centre, given that uses will be dispersed across several locations rather than focused in a single area.
- 9.3 In either scenario, however, two sites are of fundamental importance. Firstly, in respect of the Vicarage Street site, which is to be taken to market in the coming months, it is our view that achieving development of the scale and nature that delivers greatest benefit to the performance of the centre is crucial. In order for this to happen, any brief to developers should clearly set out the mix of uses sought (and not sought) along with parameters for the quantum of floorspace for each. A more open brief is unlikely to yield the benefits for the centre that such an important site should, and without established criteria against which to measure proposals, inevitably, the financial offer alone becomes the principal determining factor in selecting a preferred developer.
- 9.4 Secondly, the bus station site occupies a very key location for the centre, almost equidistant between the train station and the heart of the centre and on the principal route between the two. Redevelopment of the site to include a rationalised bus station as well as development which takes advantage of the riverside and defines the

frontage Harefield Road will be difficult to achieve in design terms. In particular, it will be important to minimise the land-take of the bus station to ensure that the remainder is of adequate scale to be attractive to the development market. In addition, the location of the bus station within the site will be crucial. Any new development should seek to create an active frontage along as much of Harefield Road as possible and also capitalise on the riverside location and its amenity value through inclusion of leisure and food and drink uses at ground floor with housing or offices above.

- 9.5 Of the two spatial framework options identified for Nuneaton, Option 1 - Quarters is better aligned with the floorspace requirements identified previously in the report and is also considered to present less risk. As such, we recommend that this is the strategy for the centre that is pursued.

Bedworth

- 9.6 Similarly, the options for Bedworth present very different approaches. The 'Quarters' framework suggests development of business quarter with new office accommodation and a shift/enlargement of the retail core around the Tesco store which is to be redeveloped and enlarged. Whilst the development of a business quarter would certainly support the centre, there remains some question as to whether demand exists for such office development in Bedworth, and whether it is desirable to draw any demand that is available in the market area away from Nuneaton as the principal town in the Borough. The 'Consolidate and re-focus' framework seeks to ensure that activity in the centre is concentrated in such a way that town centre businesses can capitalise on the activity generated by one another and support the centre through additional residential development and focal public realm at the core of the centre.
- 9.7 Any future plans and strategies for Bedworth town centre must recognise that its assets and the drivers of activity and footfall are arranged around the centre and that the core itself is unattractive in parts. Drawing people from these footfall drivers into the core will be important, as will addressing environmental and built form quality. This means that under either option, the redevelopment of one or both of the blocks that form the western frontage of All Saints Square should be considered to facilitate more direct and attractive routes to the core of the centre and to provide accommodation that retailers and other town centre businesses would seek to locate in.
- 9.8 Also, it is important to note that under either option, the health of the centre would benefit from new residential development in the areas immediately surrounding the centre and would suffer if further retail or other town centre uses were permitted outside of central part of the centre.

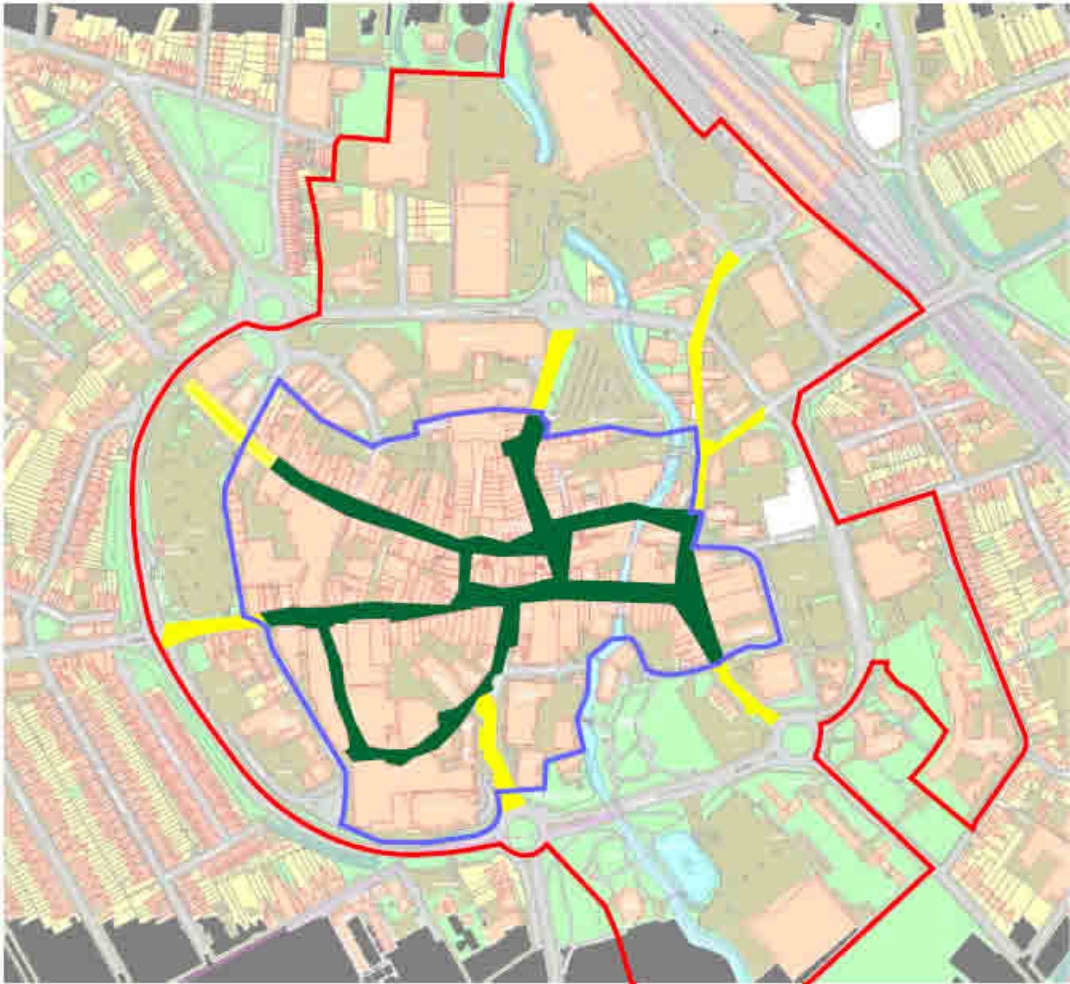
- 9.9 In Bedworth, it is Option 2 - Consolidate and re-focus that appears better aligned with the identified requirement for additional retail floorspace and is overall of lower risk. It is recommended that this is the Strategy that is pursued.

Recommendations

Town Centre Boundaries and Primary/Secondary Frontages

- 9.10 The plan overleaf sets out our recommendations in respect of Nuneaton's Town centre Boundary and Primary Shopping Area boundary, as well as the extent of the town's primary and secondary shopping frontages. These proposals are based on the detailed analysis of the centre undertaken by the study team, applying the definitions of each set out in PPS 4.
- 9.11 Specifically, the town centre boundary is unchanged from previously and covers the Primary Shopping Area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The Primary Shopping Area is where retail development is concentrated, comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage.
- 9.12 The Primary Frontages are those which include a high proportion of retail uses, whilst the Secondary Frontages provide a more diverse range of town centre uses.

Nuneaton Town Centre Boundaries and Frontages



KEY

- Town Centre Boundary (Unchanged)
- Primary Shopping Area
- Primary Frontages
- Secondary Frontage

Nuneaton & Bedworth Town Centres Study

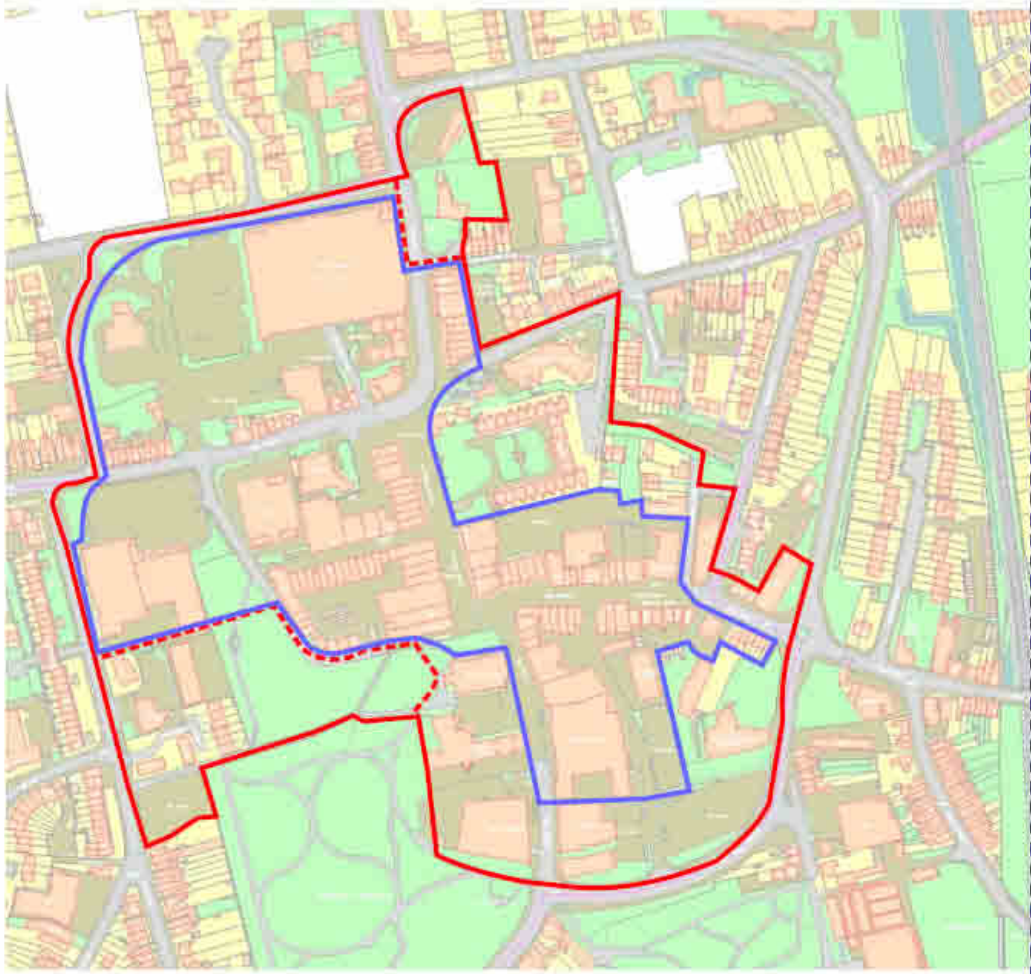
Nuneaton Town Centre Boundaries and Frontages

10th July 2011 For Use Proprietary to B&B

ROGER TYM & PARTNERS
Planners and Development Economists

- 9.13 The plan overleaf sets out our recommendations in respect of Bedworth's Town Centre Boundary and Primary Shopping Area boundary. As with the proposals for Nuneaton above, these are based on the study team's detailed analysis of the town centre and in line with the definitions in PPS 4. Given the scale and functionality of Bedworth, primary and secondary frontages have not been identified and do not need to be identified in a centre of this size.
- 9.14 Two relatively minor changes to the Town Centre Boundary are proposed. These changes more tightly define the town centre by excluding areas from the town centre to the north east and south west. Neither of these areas are occupied by town centre uses, nor would the centre benefit from their future development for town centre uses, as this would serve to dissipate footfall and activity as opposed to focusing and concentrating it on the core of the centre where it is most needed and would be most beneficial.

Bedworth Town Centre Boundaries



KEY

- Existing Town Centre Boundary
- - - Proposed change to Town Centre Boundary
- Primary Shopping Area

Nuneaton & Bedworth Town Centres Study

Bedworth Town Centre Boundaries

0 100m 200m

TYM & PARTNERS
Urban and Development Economics

Next Steps

9.15 Following on from this report, we recommend that several further discreet pieces of work are taken forward. In particular, we recommend:

- The preparation of a detailed development brief for the Vicarage Street site in Nuneaton to use as the basis for any future marketing exercise;
- Consideration of the feasibility of redeveloping the 1960s block forming the western frontage of All Saints Square in Bedworth to provide more attractive and modern town centre units and a high quality pedestrian route from the market and Aldi/Home Bargains to where High Street, King Street and All Saints Square meet;
- A 'Car Parking and Movement Strategy' for each centre, that will identify the optimal future provision of town centre parking and means of ensuring that accessibility by a choice of modes of transport is maximised, particularly in respect of non-car modes;
- A 'Public Realm Strategy' for each centre in order to ensure that the unique assets of the two towns are well connected to each other and to the core of the centres in which they are located, and to increase the attractiveness of the centres, encouraging more people to stay in the centres for longer; and
- Consideration of potential funding sources to deliver development of key sites (as necessary) and the recommendations of the car parking and movement and public realm strategies for each centre.