

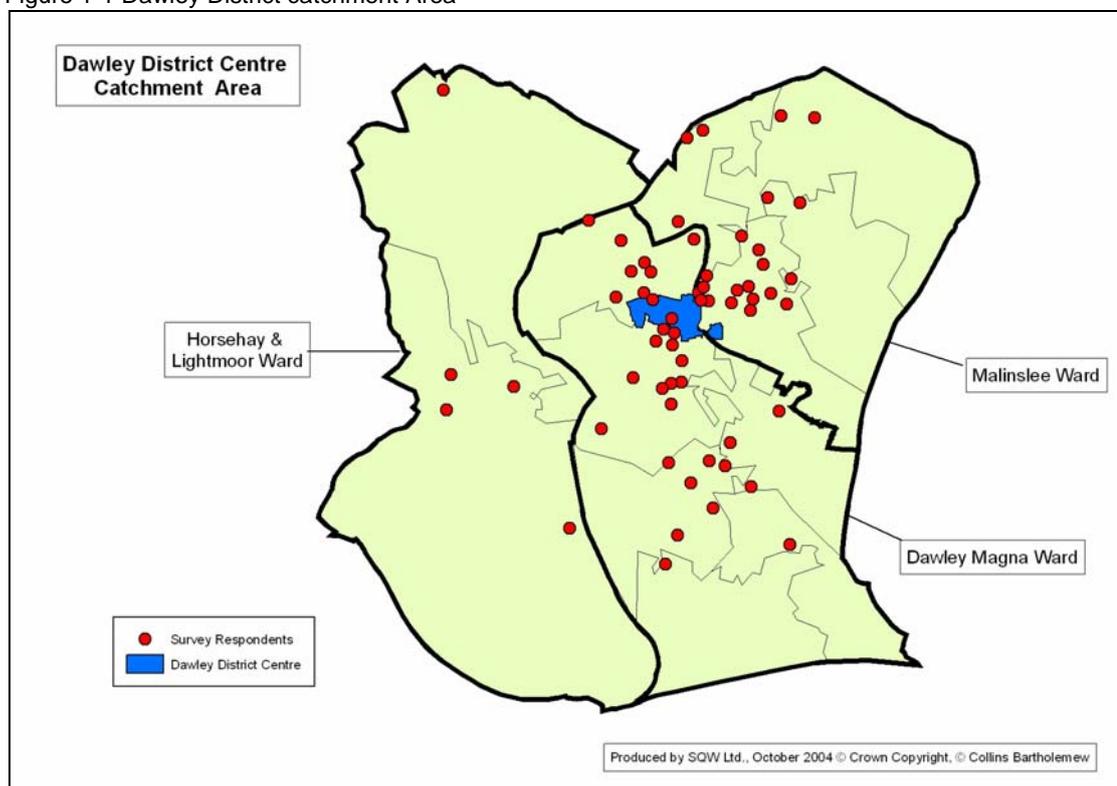
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1 Introduction

The catchment area

- 1.1 The catchment area for Dawley District Centre (DC) was determined using postcode data from shopper survey respondents¹. Respondents living in the three wards of Malinslee, Dawley Magna, and Horsehay & Lightmoor comprised 73% of the survey respondents who provided complete postcodes. These three wards combined have a total population of 18,383, and together represent the core catchment area for the DC (Figure 1-1).

Figure 1-1 Dawley District catchment Area



¹ A survey of 103 shoppers in Dawley was conducted as part of this study by BMG during September and October 2004

2 Socio-economic profile

High population density

- 2.1 The population density for the Dawley catchment area is 17.1 people per hectare, which is substantially higher than the Telford and Wrekin average (5.5) but very similar to the average across the other DCs.

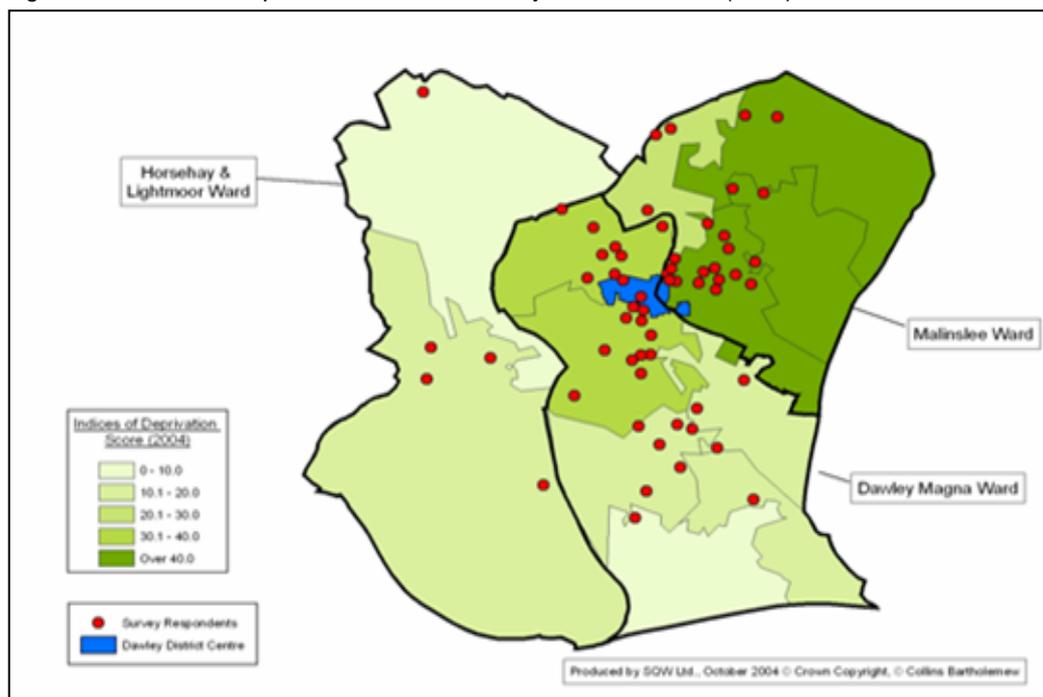
Younger age groups slightly over-represented

- 2.2 Dawley DC is slightly over-represented in the younger age groups (23% aged under 16, and 19% aged 16-29), and slightly under-represented in the older age groups (46.5% aged 30-64 and 11.2% aged 65 and over). The working age population constitutes two-thirds of the population (66.9%).

Wide range of deprivation – Malinslee Ward experiences acute levels of deprivation

- 2.3 The average Indices of Deprivation score (2004) for the Dawley catchment area is 24.9, slightly above the Borough average (21.8). There is, however, considerably variation around this mean. A large proportion of the Malinslee ward experiences acute levels of deprivation which peak at a score of 53.5. Approximately one third of survey respondents in the Dawley catchment area reside in this area of high deprivation, see Figure 2-1.

Figure 2-1 Indices of Deprivation Score for Dawley catchment area (2004)



Wide variation in qualification levels – almost half the population in Malinslee have no qualifications

- 2.4 Over one third of the working age population in the Dawley catchment area do not have any qualifications (35.4%), compared to a Borough average of 31.8%. There is, however, substantial diversity within the catchment area. Horsehay & Lightmoor Ward has one of the lowest proportions of people without qualifications (20.8%), whereas Malinslee has one of the highest (44.5%). A low proportion of people are educated to degree level or above; at 11.4%, this is 20% lower than the Borough average.

High economic activity and employment rates

- 2.5 The economic activity and employment rates in the Dawley catchment area are relatively high compared to other DC catchment areas, constituting 68.6% and 63% of the population aged 16-74 respectively. The level of unemployment stands at 3.6%, with 2% claiming Job Seekers Allowance (JSA). The claimant count is highly variable across the catchment area, with Malinslee ward having the highest claimant count of JSA. Under one third of the 16-74 age group are economically inactive (31.4%), 33.4% of which are retired - almost 10% less than the Borough average.

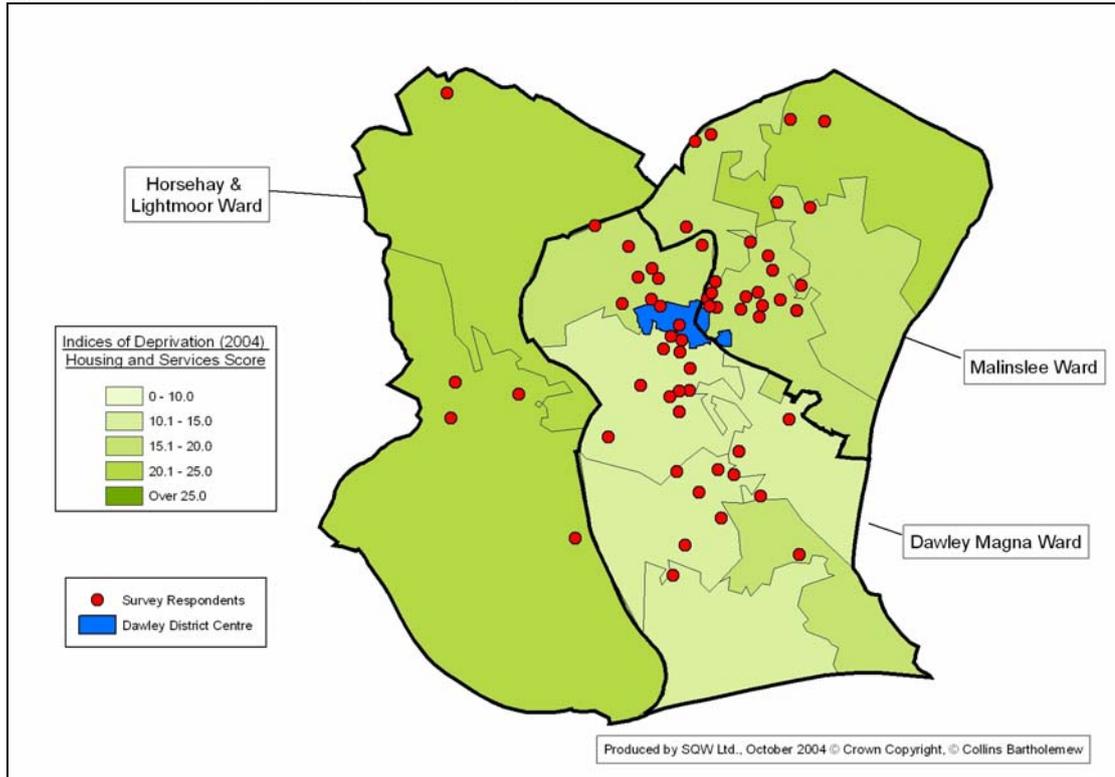
Low wage economy

- 2.6 Gross weekly pay (2003) for full and part time employees in the Dawley catchment area was £299, which increases to £342 when only taking full time employees into account (data unavailable for Horsehay & Lightmoor ward). These earning levels are relatively low compared to both the Borough average and other DC catchment areas. Correspondingly, the proportion of working age people dependent on Income Support (14%) is above the Borough average (11%). Over one fifth of Malinslee residents claim Income Support benefits.
- 2.7 The Dawley catchment area is relatively dependent on manufacturing for employee jobs, accounting for 29% of the workforce (compared to an average of 25% across Telford and Wrekin).

Approximately one quarter of residents do not own a car

- 2.8 Almost one quarter of households in the Dawley catchment area do not own a car, although, as Figure 2-2 indicates, this does not appear to create major difficulties in terms of accessibility of key services (and housing).

Figure 2-2 Indices of Deprivation (2004) Housing and Services score



Very high Incapacity Benefit and Disability Allowance claimant rates in Malinslee

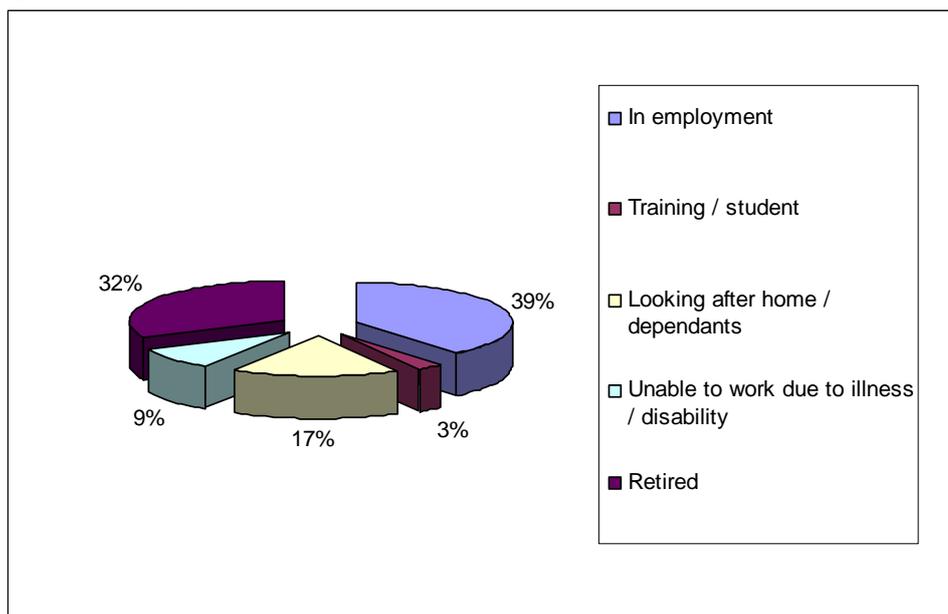
- 2.9 The proportion of residents with a limiting long-term illness (18.7%) is relatively low, compared to other DCs, and reflects the Borough average. However, the proportion claiming health-related benefits is extremely high: 5.1% claim Incapacity Benefits, compared to 4.3% across the Borough, and 6.2% claim Disability Allowance, which is 20% above the Borough average. These figures are inflated by the Malinslee ward, which has the highest Incapacity Benefit claimant rate in the Borough (7.2%) and the second highest Disability Allowance claimant rate (8.1%).

3 Shopper activity

High usage by economically inactive groups

- 3.1 People aged 65 and over made up a relatively large proportion of the survey sample (29.1%), whereas the 16-24 age group was very under-represented (5.8% compared to an average of 16.7% for all DCs). The 25-44 age group made up the largest proportion of the survey sample (32.1%). Almost two thirds of respondents were female.
- 3.2 As Figure 3-1 illustrates, only 38.9% of respondents were in employment, which is low compared to other DC surveys. 60% of those in employment worked full time, and a further 10% were self-employed. Almost two thirds (65%) worked in the local area. Approximately 60% of respondents were economically inactive; one of the most inactive samples from DCs surveyed. Over 17% of respondents looked after their home and / or dependents, and 31% were retired.

Figure 3-1 Employment status of respondents in Dawley DC

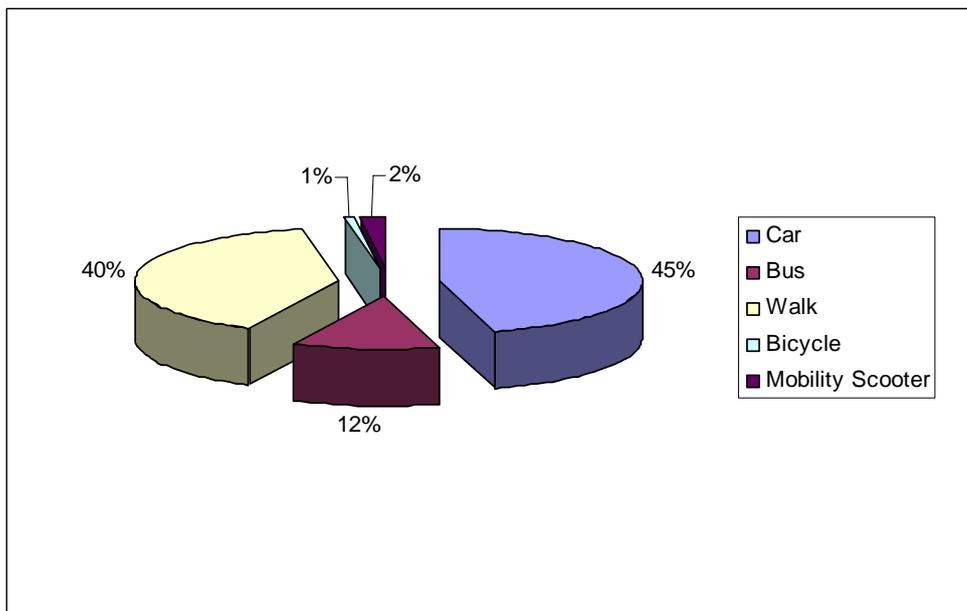


A centre for top-up shopping

- 3.3 Almost half the respondents used Dawley DC for top-up shopping (46.6%). Other popular reasons for visiting the DC included specialist shops (12.6%), the Post Office (5.8%) and for work (5.8%)

3.4 The majority of respondents had travelled directly from home, either by car, walking or by bus (Figure 3-2). Dawley DC was used for short, but regular visits: over three quarters of respondents intended to visit for one hour or less, and 71.9% visited the DC twice a week or more.

Figure 3-2 Mode of transport used by respondents to reach Dawley DC



3.5 A large proportion of respondents (67%) regularly visited Telford Town Centre for their shopping. The only other notable DC that respondents regularly visited was Wellington (44%). Reasons for visiting other centres included main food shopping (85.2%), specialist shops (64.8%), financial services (50%), Post Office (50%), eating out (34.1%), hairdressers (33%) and chemists (27.3%). Respondents in Dawley DC regularly used Asda (town centre), Co-op and Tesco for their food shopping. Only 14.6% of respondents did not regularly visit any other town or district centre, a relatively low level compared to other DCs.

Low levels of spending

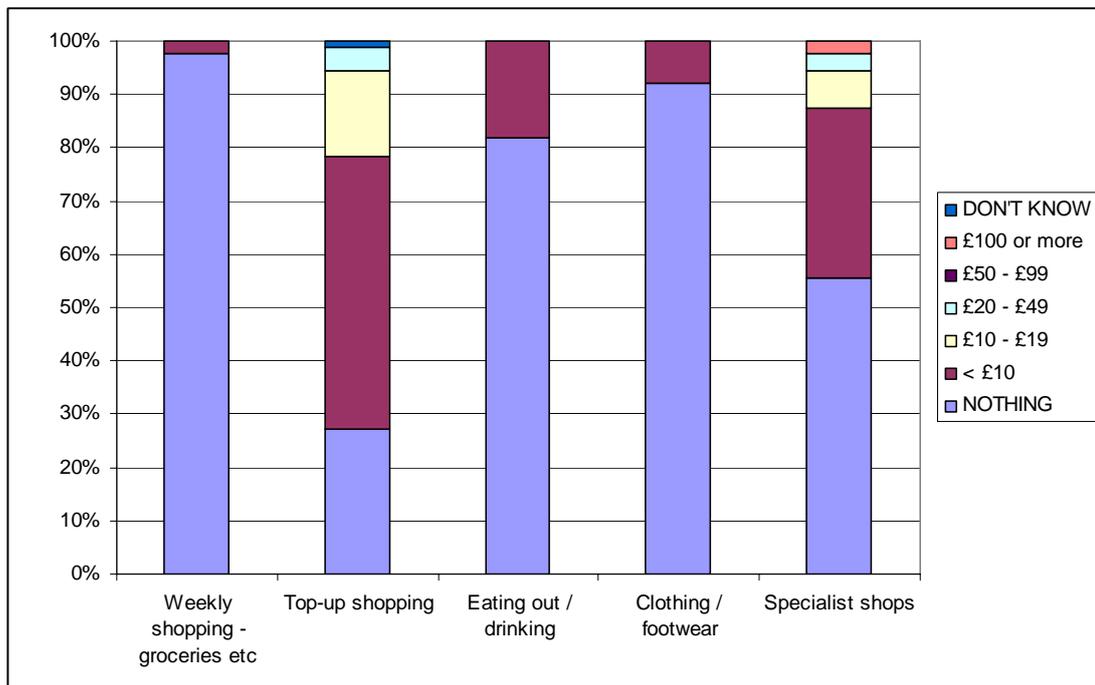
3.6 Overall spend in Dawley is low. Mean expenditure (Table 3-1) is below average compared to all the DCs in every category of spend. Over 80% of respondents spent, or intended to spend, less than £20, of which half spent under £10 and a further 10% spent nothing. Respondents spent the most on specialist shops, followed by top-up shopping.

Table 3-1 Mean expenditure of shoppers in Dawley DC

Spend type	Mean spend
Weekly shopping - groceries etc	£0.11
Top-up shopping	£6.51
Eating out / drinking	£0.91
Clothing / footwear	£0.40
Specialist shops	£7.16

3.7 Figure 3-3 confirms that very little was spent in the Dawley DC, especially on main food shopping, eating out and clothing / footwear.

Figure 3-3 Respondent spend, by category



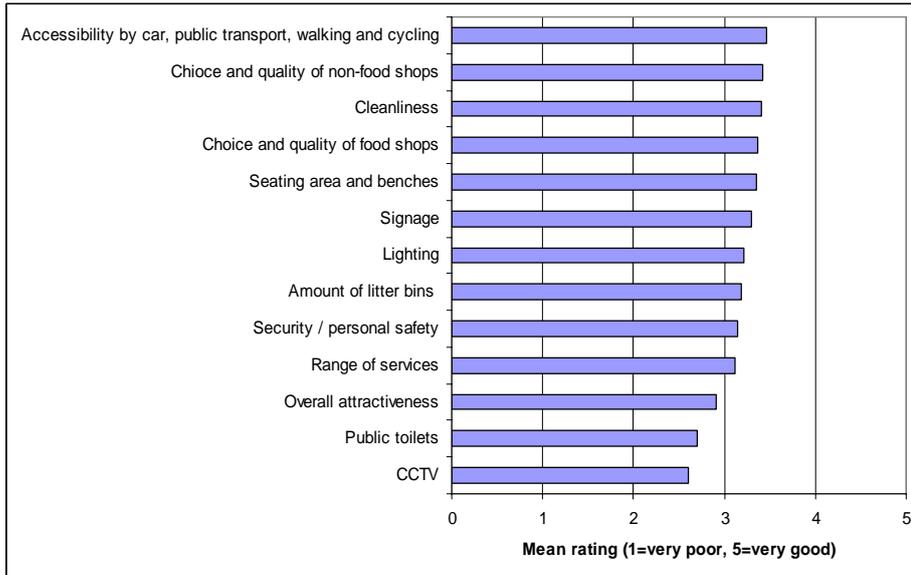
A small night time economy

3.8 Eighteen per cent of respondents used Dawley DC at night, mainly to go for a drink or eat out. Almost 17% of respondents participated in late night shopping in the DC, twice the average rate for all DCs. An above average proportion of respondents did not visit the DC at night (81%), predominantly because they did not feel the DC offered anything of interest (74.1%). A substantial proportion of respondents felt unsafe in Dawley DC at night (33.4%, compared to an average of 13.3% across all DCs), of which 17% felt 'very unsafe'. The overriding reason for this is groups of youths causing a nuisance, amplified by a fear of aggressive behaviour. Dawley was the only DC where no respondents felt 'very safe' at night.

Mixed satisfaction ratings

3.9 Compared to other DCs, shoppers in Dawley were quite critical of the DC. CCTV, toilet facilities and overall attractiveness of Dawley were rated as 'poor' by 38.8%, 31% and 28.2% of respondents respectively. Attitudes were more positive towards the accessibility of Dawley DC, and the choice and quality of food and non-food shops, where at least half the respondents rated these as 'good' (Figure 3-4).

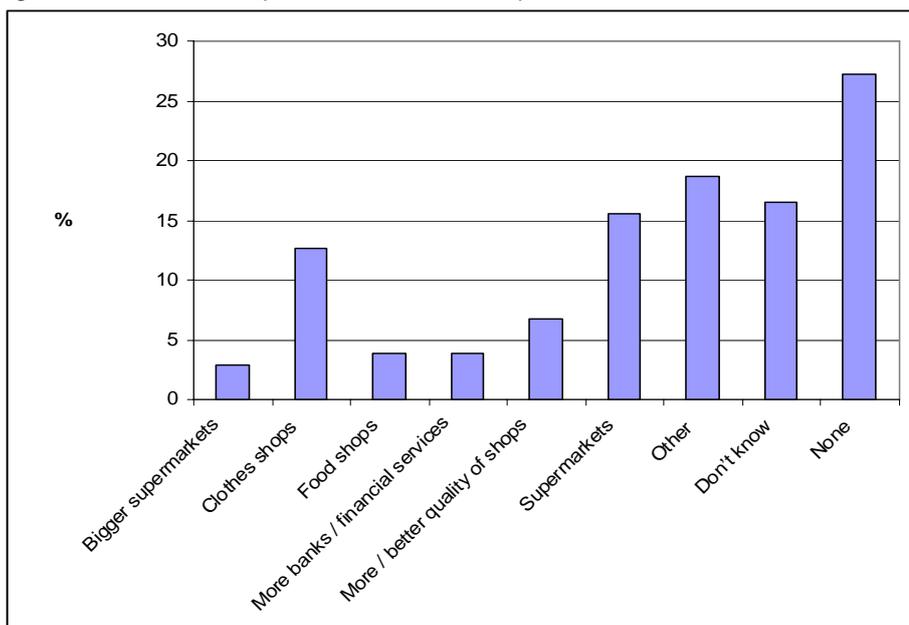
Figure 3-4 Mean rating of Dawley DC by shopper survey respondents



Suggestions for the future

3.10 Figure 3-5 illustrates the most common suggestions made by respondents to improve Dawley. The 'other' category includes all ideas that were raised by 2% or less of the sample. Almost one fifth of respondents would like to see more and bigger supermarkets in Dawley DC, which ties in with the tendency of many shoppers to go to Telford and Wellington to do their main weekly food shop. Respondents also suggested an increase in clothes shops would improve the DC. Despite a relatively critical attitude towards Dawley DC, 43.7% respondents did not put forward any ideas for improvement.

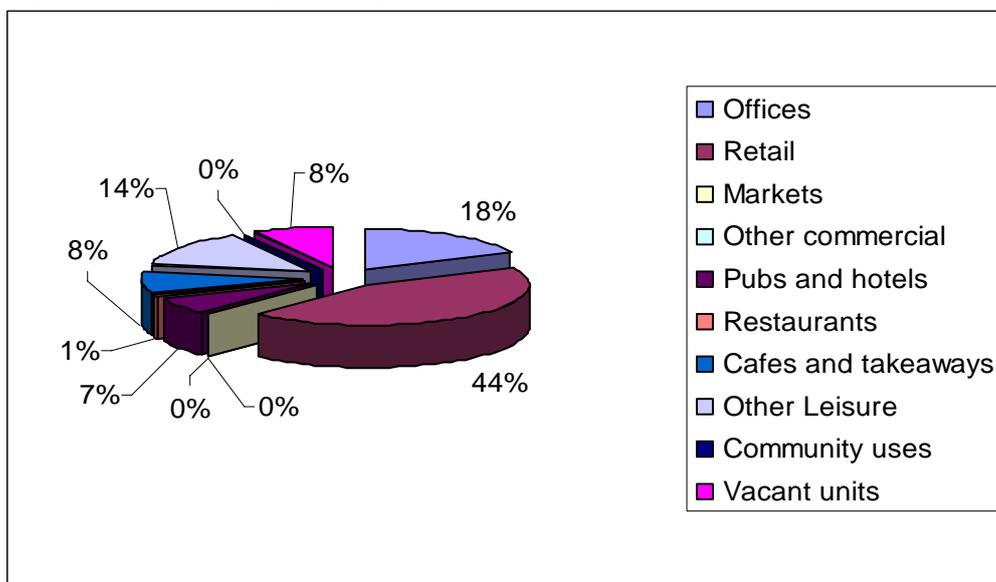
Figure 3-5 Additional shops and services that respondents would like to see in the future



4 Retail activity

- 4.1 Figure 4-1 shows the current breakdown of commercial property space in Dawley DC. It highlights that almost half of the floorspace is devoted to retail, a third of which is held by the Co-op. Dawley has a small market (on Fridays), but with only a limited number of stalls. There is also over 3,000 sq ft of office space provided in the core centre - this excludes the Council run Paddock Mount office centre, which provides 19,600 sq ft of office space in 100 - 1,000 sq ft units.
- 4.2 More than 75% of the retail units in Dawley were judged to be in adequate condition, with office units following a similar trend with 66% in adequate condition.

Figure 4-1 Commercial space usage in Dawley



Local Property Market

- 4.3 Dawley is recognised as being more of a traditional high street, but with the benefit of some business / office uses. Core data on the local property market is set out in Table 4-1.

Table 4-1 – Dawley property market data

Dawley Property Market	Key issues
Retail rents	£8 - 10 ZA
Retail use – supply and demand	Dawley is characterised by secondary retail uses and has a number of vacant units - a result largely of its proximity to Telford Town Centre
Office rents	£7 - 8 psf
Office use – supply and demand	There is some office activity in Dawley both in the High Street and in the Council's Paddock Mount (19,600 sq ft). Demand is strong particularly for small business units (up to 1,000 sq ft)
Leisure rents	N/a

Leisure use – supply and demand	There is very little supply or demand for leisure space
Residential values	Terraced houses (2 bed) - £85,000 Semi-detached houses (3 bed) - £100,000 Detached houses (4 bed) - £155,000

Retailers' comments

4.4 Retail interviews confirm that convenience shopping is the main reason for visiting the centre. It was not felt that development of Telford Town Centre would have a 'significant' negative impact on Dawley due to the DC's localised role. However, it was thought that Dawley's close proximity to the Town Centre could see it suffer more than other 'localised' centres. Retail responses also highlighted problems including:

- Anti-social behaviour in the DC in the evenings
- A fall in vitality since the High Street was partially closed
- The current contracted status of the market no longer acts to draw people to the centre on market days, with potential shoppers preferring to travel to Wellington.

5 Projections

Assessment of low, mid and high turnover / floorspace projections

- 5.1 In order to establish retail turnover and the amount of floorspace dedicated to retail and other uses through to 2011, the study's approach follows the generic methodology set out in Annex A. The initial step was to calculate the current 'retained' retail spend within the DC. This involved estimating the total spending power of the catchment area's population and the level of retail spend from catchment area residents made in Dawley DC itself. These are set out in Table 5-1 and Table 5-2.

Table 5-1: Annual spend by Dawley population (2003)

Dawley District Centre	Total estimated annual turnover
Total composite spend	£94.97m
<i>of which</i>	
Retail spend	£66.65m
Leisure spend	£28.30m

Table 5-2: Total Dawley DC turnover and floorspace

	Total Estimated Turnover	Proportion of total turnover	Total Floorspace Estimates (sq ft)
Total turnover	£10.13m	100%	44,100
Comparison goods	£2.00m	20%	13,600
Convenience goods	£5.30m	52%	13,300
Leisure spend	£2.83m	28%	17,200

- 5.2 It can be seen that convenience spend makes up the highest proportion of the turnover, largely as a consequence of the surrounding residential areas, but Dawley's proximity to Telford Town Centre and Wellington Retail Park allows a considerable amount of convenience spend to be transferred to these areas. Comparison goods and leisure outlets show poor retention - again due to the proximity of other areas offering a more varied offer.

While Dawley has an office sector in the core centre which draws a number of people into the centre from the wider area, the externally generated spend within Dawley is nevertheless considered to be minimal, given the factors listed above. We have therefore not allocated any spend under this category in terms of normal retail spend or indeed leisure spend. The total current turnover for the Dawley centre is therefore set out in

- 5.3 Table 5-2 above, together with the split between the 3 main categories of spend.
- 5.4 As set out in Annex A, 'check' calculations have been undertaken to confirm that turnover figures adopted for Dawley DC are broadly representative of the businesses operating from that location. This calculation therefore takes account of any known turnover figures (as a

result of occupier interviews, etc.) together with a comparison of floorspace / rental levels against the turnover of the businesses in occupation. The figures produced by this method are broadly in line with the £10.13m turnover set out above.

Trend analysis – demographics / floorspace

- 5.5 In order to understand the likely performance of the Centre in the period to 2011, consideration has been given to critical trends over the last 10 years that are likely to continue to influence the nature of the Dawley population base, disposable income levels, the composition of households, etc. These are set out in Table 5-3.

Table 5-3: Population and income data 1991-2001

Population	1991	2001	Change	% Change
Total	15,913	18,383	2,470	16%
Split for Age				
under 16	3,845	4,277	432	11%
16-29	3,572	3,498	-74	-2%
30-64	6,655	8,541	1,886	28%
65+	1,836	2,067	231	13%
Split by economically active				
Total active	7,698	9,070	1,372	18%
Full-time	4,988	6,236	1,248	25%
Part-time	1,090	1,458	368	34%
Split by housing tenure				
Total households	6,024	7,643	1,619	27%
Total owner-occupier	3,445	4,798	1,353	39%
Total private sector rental	187	354	167	89%
Total public sector rental	2,396	2,262	-134	-6%
Income				
Total gross weekly pay	2002	2003	Change	% Change
	277	298	22	8%

- 5.6 It will be seen that there are some important trends demonstrated by this table which will influence the future performance of the Centre. For example, population figures overall have risen by 16% over the ten years to 2001, and there has been an increase in all the age groups apart from the 16 - 29 year old segment, which has fallen slightly. Economic activity trends also show an increase and there have been significant moves within the housing stock. Overall, total households have increased by 27%, with substantial increases within the owner occupied stock and in particular within the total private rented. Conversely the numbers of property rented by the public sector have declined by 6%. Finally income levels have increased over a one year period.

- 5.7 Projecting these trends through until 2011 produces the results set out in Table 5-4. The impacts which the projections will have on Dawley DC can be primarily categorised through the increased disposable income levels resulting from the change in privately rented and

owner occupied stock. Estimates have been made of the increase in retail expenditure likely to flow from these increased number of households and these have been utilized to increase the overall expenditure levels anticipated within Dawley District Centre over the next five years.

Table 5-4 - Population and income data projections -2011

Population	2001	2011	Change	% Change
Total	18,383	21,236	2,853	16%
Split for age				
under 16	4,277	4,758	481	11%
16-29	3,498	3,426	-72	-2%
30-64	8,541	10,961	2,420	28%
65+	2,067	2,327	260	13%
Split by economically active				
Total active	9,070	10,687	1,617	18%
Full-time	6,236	7,796	1,560	25%
Part-time	1,458	1,950	492	34%
Split by housing tenure				
Total households	7,643	9,697	2,054	27%
Total owner-occupied	4,798	6,682	1,884	39%
Total private sector rental	354	670	316	89%
Total public sector rental	2,262	2,135	-127	-6%
Income				
	2002	2003	Change	% Change
Total gross weekly pay	277	298	22	8%
Increase in retail expenditure for households				
Owner - occupied		£7,417		£13.97m
Market rent		£12,379		£3.91m
Total increased expenditure				£17.88m

5.8 The calculations to apply retention levels of spend within the district and to take account of any incoming expenditure from the residents outside the district (nil in the case of Dawley) have been re-run to take account of the above increases. However, it should be noted that our assessment for the 'medium' projection has assumed that a number of improvements and initiatives will be necessary for the District Centre to take advantage of the increased expenditure that the catchment area will generate - if these initiatives are not undertaken, the District Centre is likely to fall into further decline. These initiatives include:

- Improving access through the centre - during retailer interviews, the closure of the High Street to through traffic was identified as a cause of reduced retail activity; the removal of the north-south link between King Street and New Street was also constraining movement

- Maintaining and continuing to improve the public realm
- Encouraging / retaining the small business sector - this could include investment in minor refurbishment of existing business space and marketing initiatives to promote the conversion of vacant units / upper floors to office space.

5.9 This has resulted in a revised level of total turnover for Dawley Centre as set out in Table 5-5 below - the figure as before being sub-divided between convenience, comparison and leisure expenditure. The conversion factor for this expenditure into floorspace has also been re-run and the revised floorspace calculations for the Centre provided to reflect the medium position at 2011 - this has assumed that the total existing floorspace will absorb the increased activity taking place, with all vacant units being occupied. Some office uses are also expected to be accommodated on upper floors.

Table 5-5 – Medium projections

Dawley District Centre MEDIUM PROJECTIONS 2011	Proportion of total turnover	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total Dawley Turnover		£12.05m	48,000
Comparison Goods	20%	£2.38m	14,000
Convenience Goods	52%	£6.30m	16,000
Leisure Spend	28%	£3.36m	18,000

Low Projections

5.10 In order to assess the potential for low projections within the centre, the above performance characteristics have been used but we have assumed that the improvements and initiatives outlined above do not occur, thus causing the centre to continue its decline in the retail sector - there may however be some take-up of emerging vacant space caused by the reduction in retail use, by office users.

5.11 These projections, have been re-cast and result in the turnover and floorspace levels for the Centre outlined in Table 5-6. Whilst an estimate of the total amount of office floorspace that could be required has been provided, it is not possible to provide information on turnover levels for office based businesses as this information is not available.

Table 5-6 Low projections

Dawley District Centre LOW PROJECTIONS 2011	Proportion of total turnover	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total Dawley Turnover		£7.16m	35,000
Comparison Goods	17%	£1.20m	8,000
Convenience Goods	56%	£3.97m	10,000
Leisure Spend	28%	£1.98m	12,000
Office Space			5,000

High Projections

5.12 As mentioned previously, the proximity of Dawley to Telford Town Centre and Wellington Retail Park impact significantly on the retail activity in the DC. The shopper surveys and retailer interviews confirmed that the ease of travelling to these areas, particularly to the supermarkets here, was a key attraction for the core catchment population. In our high scenario, we propose two developments which could generate increased turnover and retain commercial activity in the core centre. These are:-

- The development of a larger supermarket (possibly on the site of an existing car park) to offer more quality and choice to the immediate catchment population and those working in Dawley
- The continued promotion of the small business sector, by making direct investment in the conversion / refurbishment / redevelopment of existing units (including Paddock Mount)

5.13 The resultant figures with regard to turnover and required floorspace within the Centre are set out in Table 5-7 below (note that Paddock Mount floorspace figures are excluded from these figures).

Table 5-7 – High projections

Dawley District Centre HIGH PROJECTIONS 2011	Proportion of total turnover	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total Dawley Turnover		£17.72m	78,500
Comparison Goods	19%	£11.02m	22,500
Convenience Goods	62%	£3.34m	27,500
Leisure Spend	19%	£3.63m	20,500
Office Space			8,000

5.14 In connection with the above high projection, we are aware of a proposal to develop residential units in Lawley, which will introduce new premises onto the market consistently over the next few years. Clearly, this would have a significant impact on the performance of Dawley DC and the general hinterland. We have therefore projected a 'high plus' scenario which would assume the centre benefiting from this increase in households. Our previous comments on improving the centre remain relevant in this scenario (eg. improving access, improving the public realm and encouraging the small business sector), but we would also stress the need to ensure policy decisions were made to prevent competing uses to Dawley District Centre being brought forward as part of the Lawley development. Table 5-8 sets out the resulting figures in this scenario.

Table 5-8 – High Plus Projections

Dawley District Centre HIGH PLUS PROJECTIONS 2011	Proportion of total turnover	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total Dawley Turnover		£18.19m	83,000
Comparison Goods	19%	£3.42m	23,500
Convenience Goods	62%	£11.31m	28,500
Leisure Spend	19%	£3.45m	21,000
Office space			10,000

- 5.15 Whilst Telford Town Centre and Wellington Retail Park will also benefit from the new Lawley community, it can be seen that this development will further increase the turnover and floorspace requirements for Dawley. The Lawley development is anticipated to introduce over 3,000 new residential units into the area - the completion of this development is beyond the 2011 timescale used for the projections contained within this report, but clearly the benefits for Dawley from this could continue into the long-term.

Prognosis for Dawley DC

- Improvements are needed in Dawley DC to prevent further decline
- An increase in disposable income within the catchment area can benefit Dawley, providing action is taken to make improvements and capture the potential existing within the small business sector
- The attraction of Telford Town Centre and Wellington Retail Park can be mitigated by the development of a larger supermarket
- The residential development at Lawley will further increase turnover and floorspace requirements providing policy decisions prevent competing uses being developed