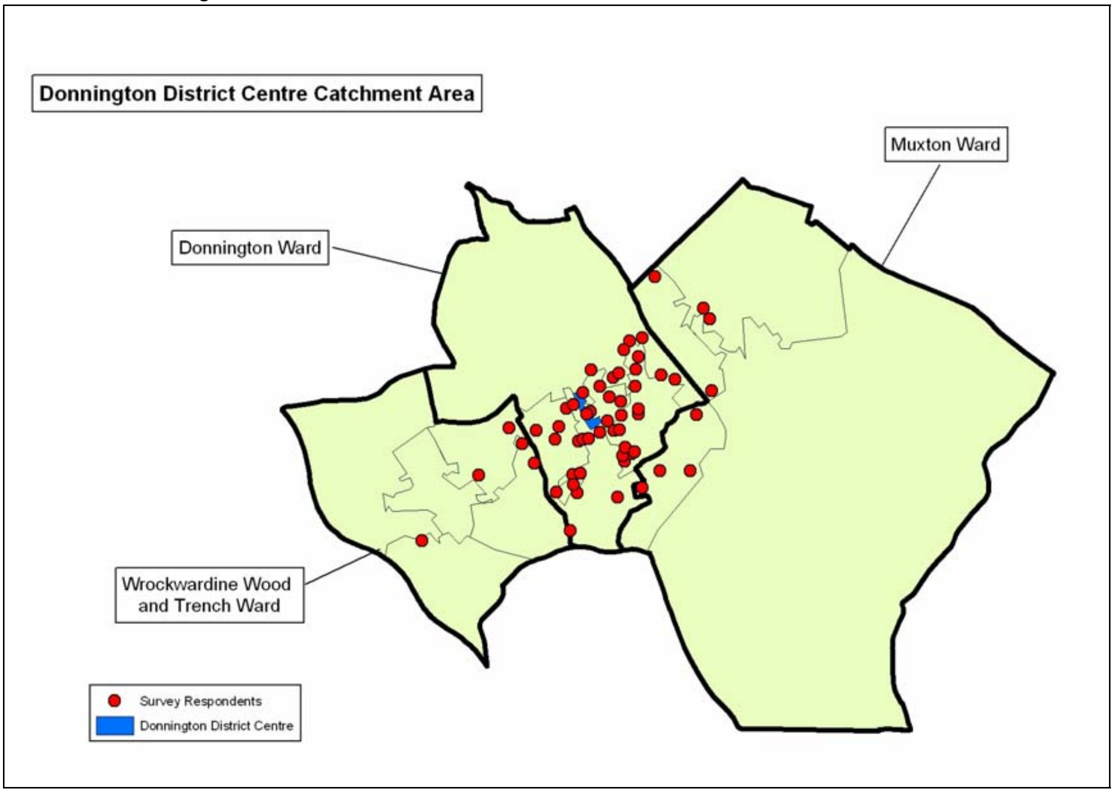
1 Donnington District Centre Analysis

The catchment area

1.1 The catchment area for Donnington DC has been determined by postcode data from the shopper survey respondents in the DC. Respondents living in the three wards of Donnington, Wrockwardine Wood and Trench, and Muxton comprised 79% of the Donnington survey sample who gave their home postcodes. These three wards make up the current core catchment area for Donnington and have a total population of 18,836 people (Table 1-1).

Table 1-1 - Donnington District Centre catchment area



2 Socio-economic profile of Donnington DC catchment area

Population structure largely reflective of the Borough

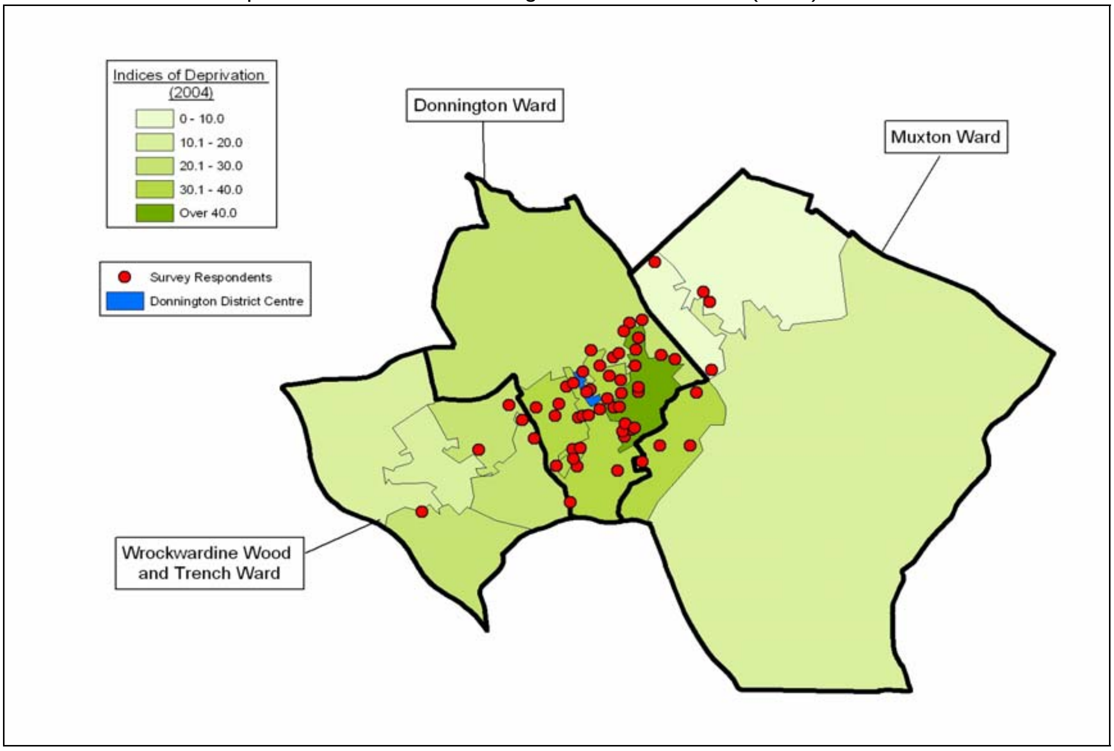
2.1 The population density of this area is 12.8 people per hectare which, despite being double the average density of Telford and Wrekin, is considerably lower than that of the West Midlands as a whole (28.34 people per hectare).

2.2 The age structure of the Donnington catchment area largely reflects the wider Borough average, with two-thirds of the population of working age. The under 16 age group (21%) and 16-29 age group (17%) are slightly under-represented. Almost half the population are aged 30-64 (47.3%), and 12.4% are over 64.

Moderate deprivation levels, with pockets of deprivation to the east of Donnington DC

2.3 The overall Indices of Deprivation score for the Donnington catchment area (20.5) is similar to that of the Borough average (21.8). However, the deprivation levels for the Super Output Area to the immediate east of the DC peak at 47.4.

Table 2-1 Indices of Deprivation Score for Donnington catchment area (2004)



Diversity in qualifications

2.4 In the Donnington catchment area 35.3% of the working age population do not have any qualifications, which is slightly above the Borough average of 31.8%. However, in the Donnington ward as much as 44.8% lack any qualifications – the highest proportion of all wards in Telford and Wrekin.

2.5 On average, 10.3% of working age people in the Donnington are qualified to degree level or above, although this proportion ranges from 7.2% in Wrockwardine Wood and Trench ward to 17.7% in Muxton ward. This compares to an average of almost 15% across the Telford and Wrekin district.

Above average employment rate with very low long-term unemployment

2.6 Donnington catchment area displays relatively high levels of economic activity (68.7%), in line with the Borough picture. The employment rate is above average (63.8%), with correspondingly low levels of unemployment. The Job Seekers Allowance claimant rate for the Donnington catchment area is 1.4%, 10% below the Borough average. Long-term unemployment rates are also extremely low (0.8% of working age population).

2.7 Economic inactivity levels for the Donnington catchment area stand at 31.3%, falling as low as 23.8% in Muxton. Over one third of the economically inactive are retired.

Low wage economy, dependent on manufacturing for employment

2.8 Gross weekly pay (2003) in the Donnington catchment area, at £277, is almost 20% less than the Borough average. Employees in Donnington ward and Wrockwardine Wood ward are amongst the most poorly paid across Telford and Wrekin, earning on average £219 and £259 per week respectively. The Donnington catchment area is relatively dependent on manufacturing and public administration sectors, accounting for 27% and 13% of employee jobs respectively.

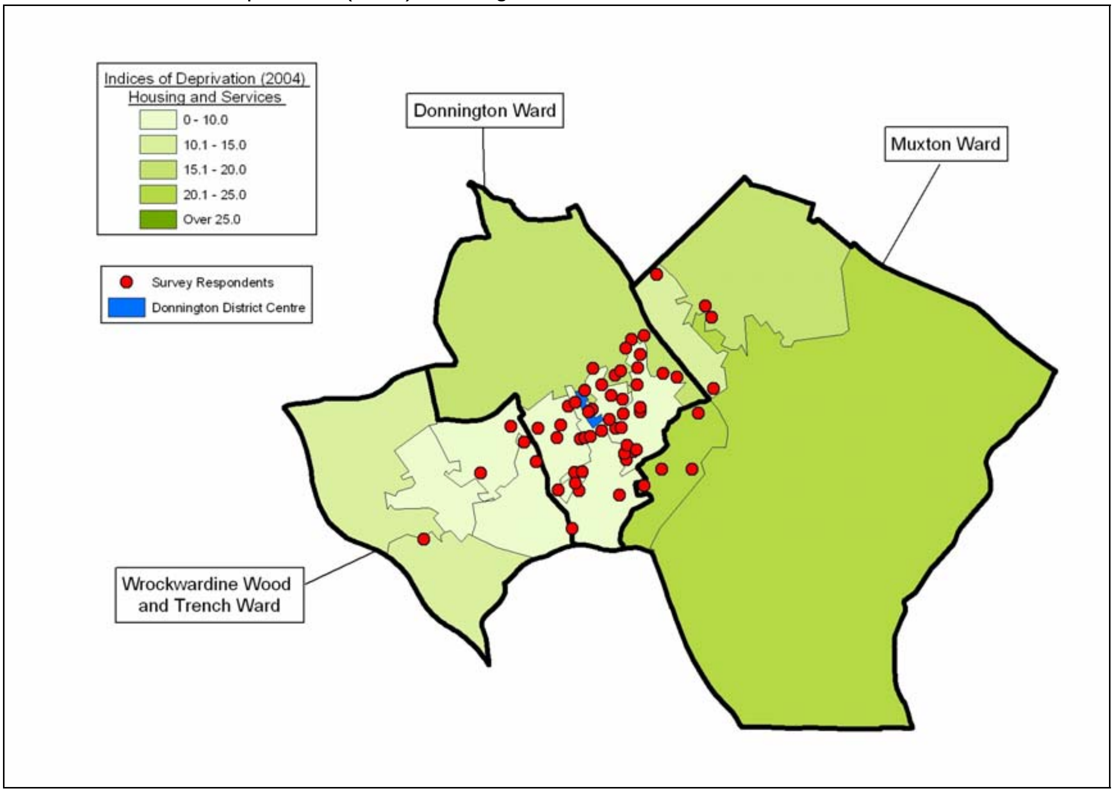
2.9 Despite the evidence of a low wage economy in the Donnington catchment area, the Income Support claimant rate (10.4%) is below the Borough average. However, this masks considerable diversity between the three wards which constitute the catchment area. In Muxton, only 6% of the working age population claim Income Support benefits, compared to almost 17% in the Donnington Ward.

Average levels of car ownership, some problems of accessibility across Muxton ward

2.10 Almost half of all households in the Donnington catchment area own a car. The proportion of households without a car 22.8%, which is in line with the Borough picture.

2.11 As Table 2-2 shows, the areas into which the majority of survey respondents fall fairly well in terms of accessibility to housing and services. There are, however, some geographical barriers to key services experienced in the Muxton ward.

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



Highest Incapacity Benefit and Disability Allowance claimant rates in Donnington ward

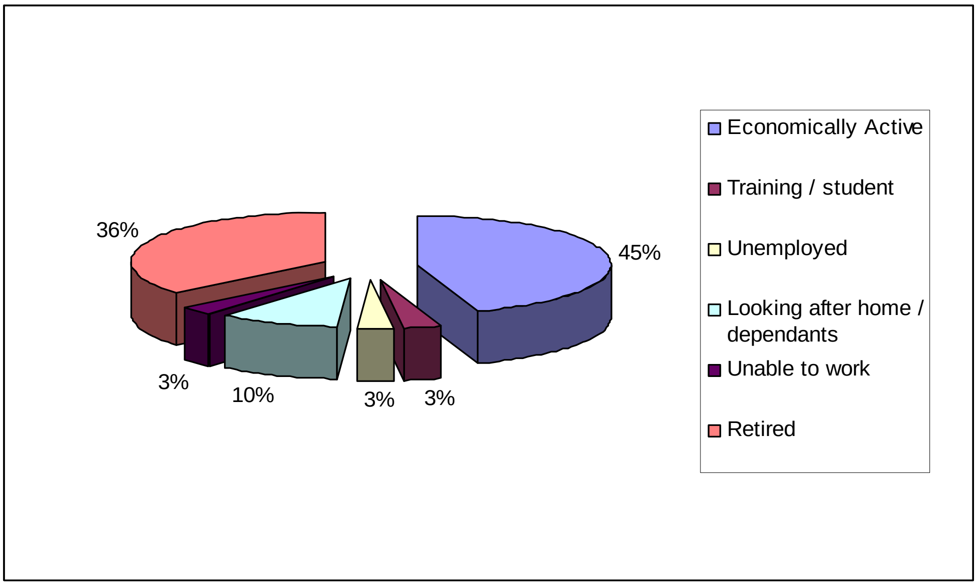
2.12 Just under 20% of people in the Donnington catchment area have a limiting long-term illness according to the 2001 Census. Incapacity Benefit and Disability Allowance claimant rates are also slightly above the Borough average, standing at 5.0% and 5.9% respectively. The claimant rates in the Donnington ward are amongst the highest in the district, with 6.9% claiming Incapacity Benefits and 8.0% claiming Disability Allowance.

3 Shopper survey in Donnington DC

Shopper profile

3.1 Almost half the sample in Donnington are within the 45-65 age group, with a further quarter who are aged 65 or over. Table 3-1 clearly illustrates that Donnington DC has a particularly high level of economic activity. Three quarters of those in employment are working full time, and 73.3% work in the local area. Within the economically inactive group, 36% of respondents were retired and only 3% were unemployed.

Table 3-1 Employment status of Donnington DC survey respondents

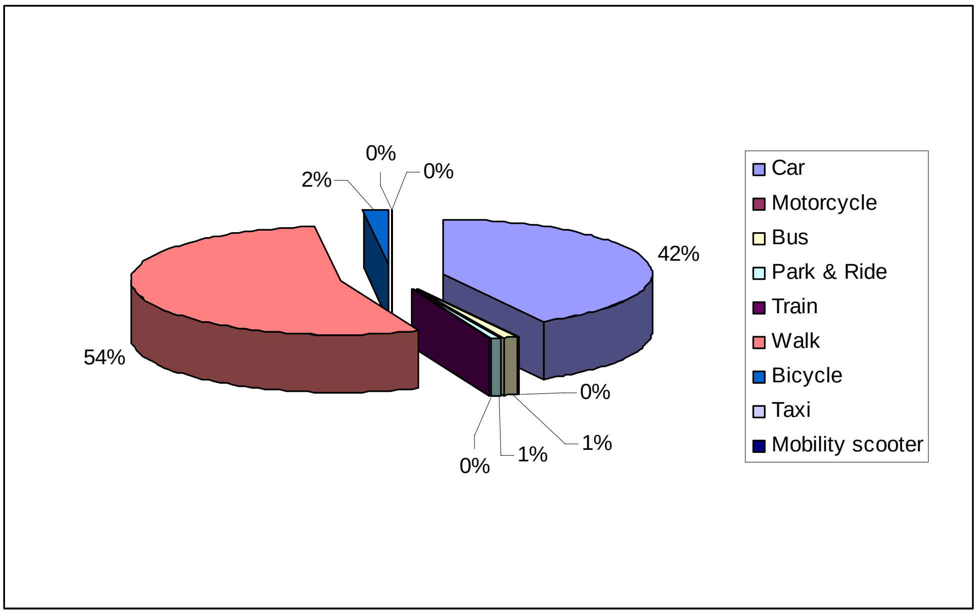


Usage

3.2 The three main reasons for respondents visiting Donnington District Centre are top-up shopping (35%), specialist shopping (21%) and the Post Office (16%).

3.3 The majority of respondents travelled to the District Centre directly from home, on foot or by car (see Table 3-2), and intend to spend under one hour there. 93% of respondents visit the District Centre once a week or more; half visit daily.

Table 3-2 Mode of transport used by respondents to reach Donnington DC



3.4 Almost 60% of respondents regularly visit Telford town centre. Wellington and Oakengates also attract regular visits from Donnington's users. Respondents gave a wide variety of reasons for visiting other DCs, the most popular being food shopping, financial services, eating out and specialist shops.

3.5 Just over one-fifth of respondents did not visit any other town or district centre in the area.

Spend

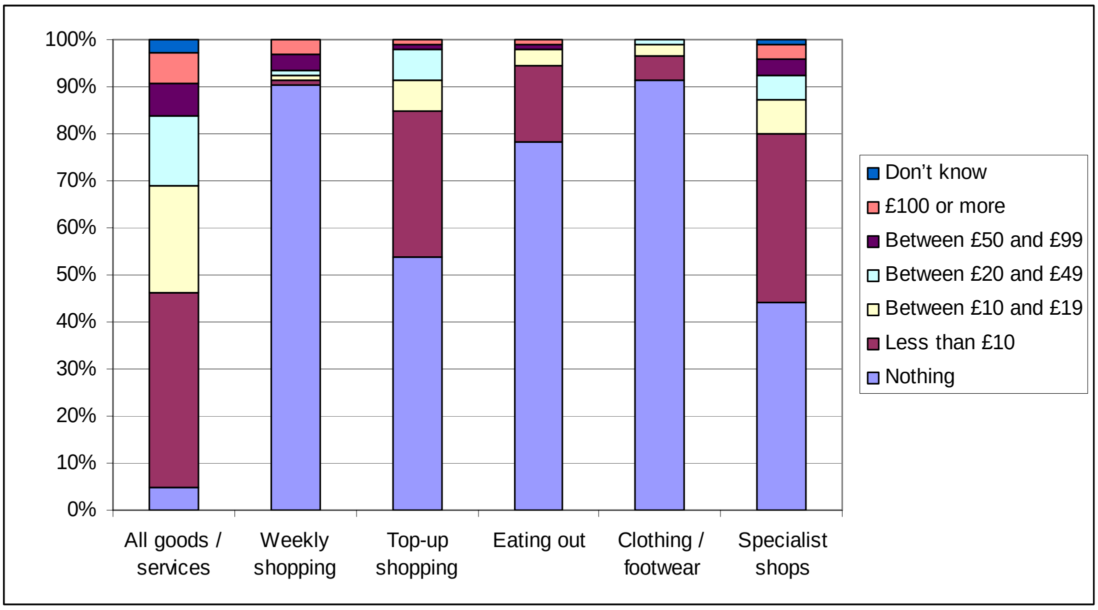
3.6 Table 3-3 confirms the tendency of shoppers to do their top-up shopping in Donnington, spending £5.58 on average in this domain. The results also show that respondents spend the most on specialist shops (£8.89, which is the greatest spend in this category across all District Centres).

Table 3-3 Mean expenditure of shoppers in Donnington DC

Spend type	Mean spend
Weekly shopping - groceries etc	£3.02
Top - up shopping	£5.58
Eating out / drinking	£2.10
clothing / footwear	£0.96
Specialist shops	£8.89

3.7 Table 3-4 overleaf illustrates that respondents spend most on top-up shopping and specialist items, and least on clothing and footwear.

Table 3-4 Respondent spend, by category



Night usage

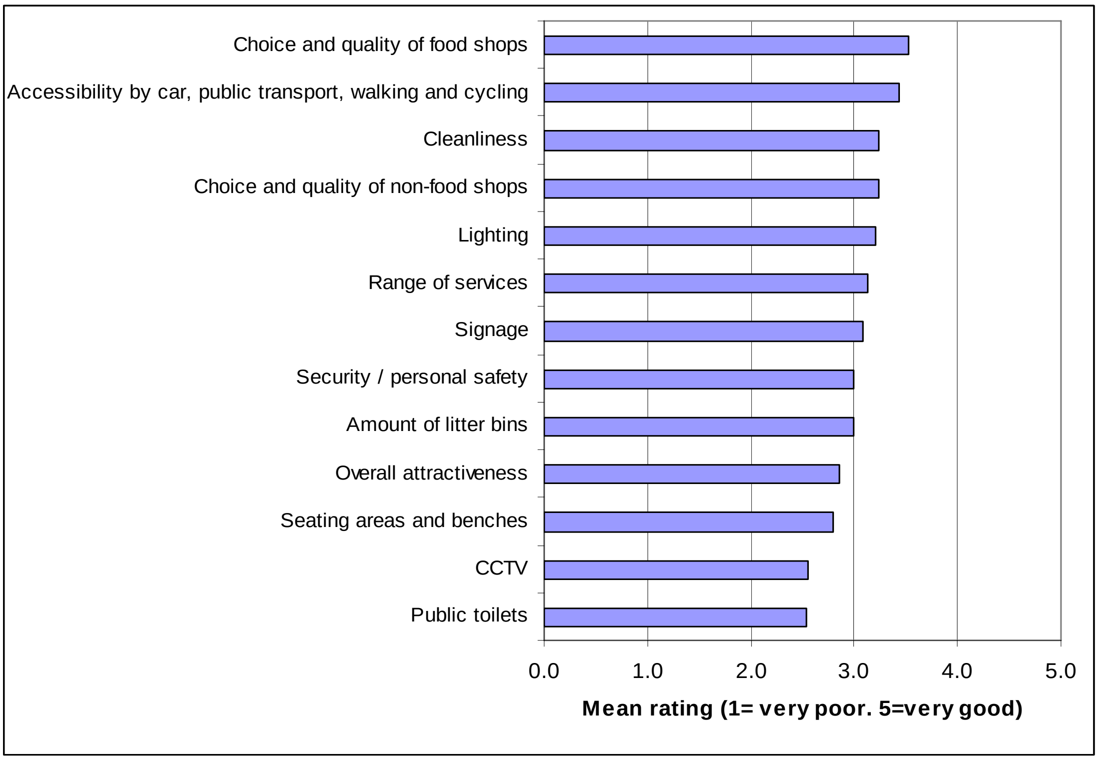
3.8 A substantial 83% of respondents do not visit Donnington District Centre at night. However, only 5.9% feel unsafe at night, mainly due to groups of youths causing a nuisance, which suggests safety concerns are not the main reason for not using the DC at night. The survey shows that over 80% of respondents do not feel there is anything of interest in the area, and cite this as their primary reason for not visiting Donnington at night.

3.9 The main attractions of Donnington DC at night are its food and drink establishments – of the 17% who visit the DC at night, 58.8% eat out, 47.1% go for a drink and 41.2 get a takeaway.

Satisfaction ratings

3.10 Survey respondents in Donnington DC seem relatively passive about what Donnington currently has to offer. On most factors, at least one third of respondents gave ratings of 'neither good nor poor'. Respondents were most critical about facilities such as public toilets and seating areas / benches, and the provision of CCTV in the District Centre. Over 50% of respondents consider the choice and quality of food shops to be 'good' or 'very good'.

Table 3-5 Mean rating of Donnington DC by shopper survey respondents

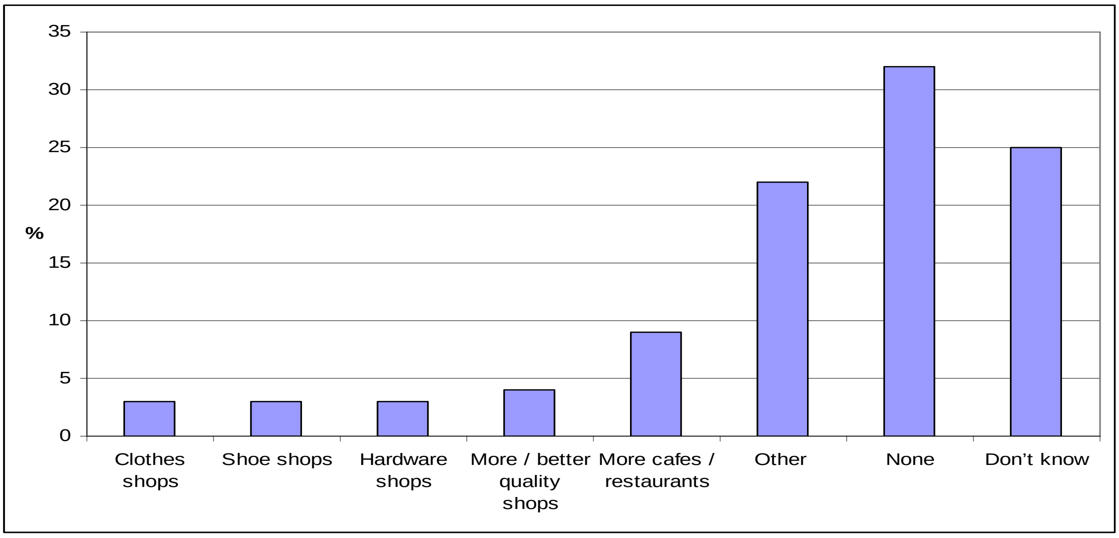


Suggestions for the future

3.11 Table 3-6 overleaf illustrates the most common suggestions made by respondents to improve Donnington District Centre in the future. The 'other' category includes all ideas which were raised by 2% or less of the sample. Respondents would most like to see an increase in cafes and restaurants, although this only accounts for 9% of respondents.

3.12 Almost one third do not feel that Donnington requires any more shops or services, suggesting they are generally satisfied with the provision in the District Centre.

Table 3-6 Additional shops and services that respondents would like to see in the future

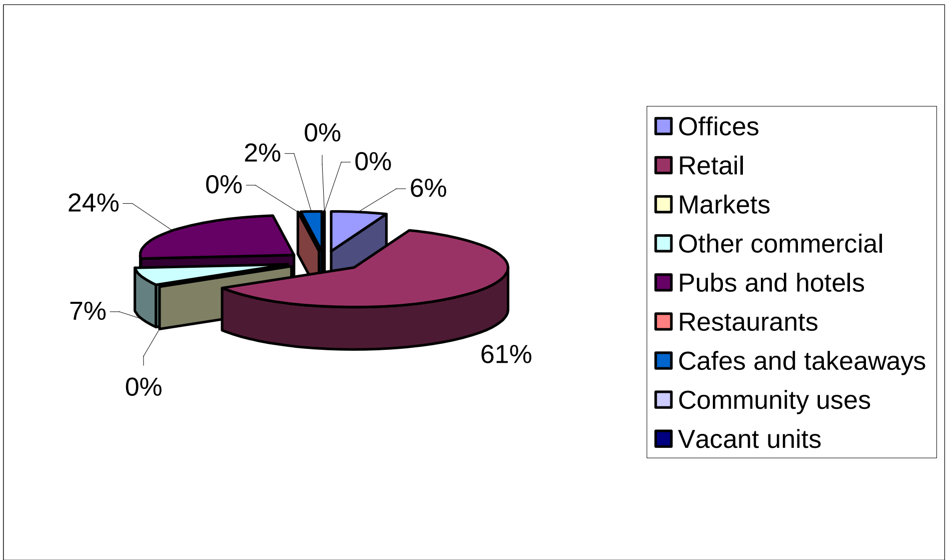


4 Retail space

4.1 Donnington is the smallest of all the DCs studied, having a total of approximately 25,000 sq ft of commercial floor space. Table 4-1 shows the current breakdown of commercial property space in Donnington DC. It highlights that retail is the dominant use, accounting for 67% of total space. Donnington's single pub accounts for 24% of total floorspace whilst offices and 'other commercial' uses amount to 6% and 7% respectively.

4.2 All of the units in the DC were judged to be in 'adequate' to 'good' condition; the public realm was also classified as adequate.

Table 4-1 Commercial space usage in Donnington



Local Property Market

4.3 Donnington District Centre predominantly serves the local population with convenience retail. The leisure and office markets are extremely limited, whilst community services are provided by a library / community hall that lies on the edge of the subject area. Core data on the local property market is set out in Table 4-2 below.

Table 4-2 – Property market data

Donnington Property Market	**Key issues**
Retail rents	£12 ZA
Retail use – supply and demand	Supply and demand appear to be balanced - there are no vacant units in The Parade but it is unlikely that Donnington, with its very local catchment, would support additional units. The limited supply does however keep rents slightly higher than in some neighbouring centres. The role of The Parade has been limited by the Aldi and Asda

	superstores that have opened outside of the core area within the last five years.
Office rents	£5 psf
Office use – supply and demand	There is very little supply or demand for office space
Leisure rents	N/a
Leisure use – supply and demand	There is very little supply or demand for leisure space; one pub serves the local market on the main parade and there are a number of takeaways within, and just outside of, the core area
Residential values	Terraced houses (2 bed) - £115,000 Semi-detached houses (2 bed) - £105,000 - £170,000 Detached houses (4 bed) - £170,000

Retailer Surveys - Comments on Donnington

4.4 Retail interviews confirm that convenience shopping is the main reason for visiting the centre and that the centre's local role has been confounded since the opening of Aldi and Asda superstores just outside of the core area. The Parade's retail offer does however continue to serve a core population, many of whom are elderly and dependent on its existence.

4.5 It was not felt that the development of Telford Town Centre would have a negative impact on Donnington, or that Donnington faced competition from any other DCs, due to its existing very localised role. Retail responses also highlighted problems including:

- Anti-social behaviour around The Parade in the evenings
- The quality of the public realm; which could be improved with additional seating.

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, our approach follows the generic methodology set out in Annex A.

5.2 The initial step is to calculate the current "retained" retail spend within the District – in other words the level of retail spend from Donnington residents made in Donnington District Centre. This spend level has been sub divided between Convenience, Comparison and Leisure activities, see Table 5-1.

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

	Total estimated annual turnover
Total composite spend	£96.18m
of which	
Retail spend	£67.74m
Leisure spend	£28.44m

5.3 Table 5-2 shows the expenditure in Donnington District Centre, only 4% of total spend by the Donnington population. Of the retained 4% spend; most of this (68%) is spent on convenience goods, lower than many of the DCs. This is largely because the two largest supermarkets within reach of Donnington, Asda and Aldi, are outside of the core Centre boundary. Whilst the core District Centre does have a Co-op, this serves a much smaller localised need. The retained spend figures for comparison and leisure spend are also minimal, reflecting the limited nature of the offer.

5.4 Externally generated spend within Donnington is also virtually non-existent – 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 Donnington centre is therefore set out in the table below, together with the split between the three main categories of spend.

Table 5-2: Total Donnington DC turnover

	%'age of retained spend between sectors	Total Estimated Turnover
Total turnover		£3.93m
Comparison goods	10%	£0.41m
Convenience goods	68%	£2.67m
Leisure spend	22%	£0.85m

5.5 As set out in Annex A, "check" calculations have been undertaken to confirm that turnover figures adopted for Donnington centre 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.

5.6 The total turnover estimate arising from this calculation is £5.10m (compared with £3.93m above). This is considered to represent a reasonable match – and in order to provide a single working assessment of Turnover for the purposes of the projections in the next part of this exercise – the lower turnover figure of £3.93m has been adopted.

Trend analysis – demographics / floorspace

5.7 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 – which will continue to influence the nature of the Donnington population base, such as disposable income levels, the composition of households, etc. These are set out in Table 5-3 below.

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

Population	1991	2001	Change	% Change
Total	12,530	18,836	6,306	50%
Split for Age				
under 16	2,868	3,999	1,131	39%
16-29	2,689	3,232	543	20%
30-64	5,131	8,950	3,819	74%
65+	1,846	2,408	562	30%
Split by economically active				
Total active	5,858	9,264	3,406	58%
Full-time	3,982	6,482	2,500	63%
Part-time	791	1,547	756	96%
Split by housing tenure				
Total households	4,638	7,489	2,851	61%
Total owner-occupier	2,626	5,194	2,568	98%
Total private sector rental	169	307	138	82%
Total public sector rental	1,859	1,723	-136	-7%
Income	**2002**	**2003**	**Change**	**% Change**
Total gross weekly pay	284	277	-7	-2%

5.8 It can 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 increased by 50% over the ten years to 2001. Within the population base, all age groups have seen a significant increase, but this is most marked in the working age group from 30 – 64 which has increased by 74%.

5.9 There have also been significant moves within the housing stock with owner occupation almost doubling over the 10 year period and the private rented sector rising by 82%. Conversely, the numbers of property rented by the public sector have declined slightly. Finally, income levels have decreased marginally over a one year period.

5.10 Projecting these trends through until 2011 produces the results set out in Table 5-4 below. The impacts which the above projections will have on the Centre 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 numbers of households and these have been utilized to increase the overall expenditure levels anticipated within Donnington District over the next five years.

Table 5-4 Population and income data projections -2011

Population	**2001**	**2011**	**Change**	**% Change**
Total	18,836	28,316	9,480	50%
Split for age				
under 16	3,999	5,576	1,577	39%
16-29	3,232	3,885	653	20%
30-64	8,950	15,611	6,661	74%
65+	2,408	3,141	733	30%
Split by economically active				
Total active	9,264	14,650	5,386	58%
Full-time	6,482	10,552	4,070	63%
Part-time	1,547	3,026	1,479	96%
Split by housing tenure				
Total households	7,489	12,093	4,604	61%
Total owner-occupied	5,194	10,273	5,079	98%
Total private sector rental	307	558	251	82%
Total public sector rental	1,723	1,597	-126	-7%
Income	**2002**	**2003**	**Change**	**% Change**
Total gross weekly pay	284	277	-7	-2%
Increase in retail expenditure for households				
Owner - occupied		£7,417		£37.67m
Market rent		£12,379		£3.10m
Total increased expenditure				£40.77m

5.11 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 Donnington), have been re-run to take account of the above increases. This has resulted in a revised level of total turnover for Donnington Centre as set out in Table 5-5 below – the figure as before being sub-divided between convenience, comparison and leisure expenditure. Whilst this shows that there is an increase in turnover, it is unlikely that this will be converted into additional floorspace as on-site inspections revealed that there are no available opportunities for extending the existing retail units. Information provided during retailer interviews also suggested that the extent of retail units currently provided in Donnington, would be able to absorb the increase in turnover without carrying out expansion works.

Table 5-5: Medium projections to 2011

Donnington District Centre MEDIUM PROJECTIONS 2011	%age Spend between Sectors	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total DonningtonTurnover		£5.60m	22,000
Comparison Goods	10%	£0.58m	5,000
Convenience Goods	68%	£3.86m	10,000
Leisure Spend	22%	£1.21m	7,000

Low Projections

5.12 In order to assess the potential for low projections within the Centre the above performance characteristics have been re-assessed. In particular, it is assumed that the relatively low level of comparison shopping that exists is reduced even further limiting this offer to 2 or 3 units only. Whilst it is conceivable that the convenience retail outlets would be keen to acquire this available retail space, any resultant increase in turnover is thought to be minimal.

5.13 These projections have therefore been re-cast and result in the following turnover and floorspace levels for the Centre in this scenario as at 2011, set out in Table 5-6 below.

Table 5-6 – Low projections

Donnington District Centre LOW PROJECTIONS 2011	%'age Spend between Sectors	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total Donnington Turnover		£3.73m	22,000
Comparison Goods	5%	£0.20m	2,000
Convenience Goods	72%	£2.67m	13,000
Leisure Spend	23%	£0.85m	7,000

High Projections

5.14 As mentioned Donnington is the smallest District Centre and is overshadowed largely by the 2 supermarkets which are positioned at either end of it. There are virtually no sites available for development or expansion in the core District Centre area and we are unaware of any large-scale development opportunities which may come forward in the next 5 years which would impact significantly on the Centre. Should such redevelopment occur (for instance, following release of MoD land), the comprehensive redevelopment of Donnington DC would need careful consideration.

5.15 We therefore anticipate the 'high' projection to 2011 to be broadly similar to the 'medium' scenario, which factors in the demographic changes to population, household formation and disposable income, but have made a slight allowance for some piece-meal residential development to occur on sites adjacent to the Kings Social Club and along New Trench Road. As with the 'medium' projection, this scenario assumes that the existing units in the Centre will absorb any increase in retail activity within their existing accommodation. The estimated turnover is set out in Table 5-7 below.

Table 5-7 – High projections

Donnington District Centre HIGH PROJECTIONS 2011	%'age Spend between Sectors	Total Estimated Turnover	Total Floorspace Estimates
Total Donnington Turnover		£5.61m	22,000
Comparison Goods	10%	£0.58m	5,000
Convenience Goods	68%	£3.81m	10,000
Leisure Spend	22%	£1.21m	7,000

Prognosis for Donnington DC

- Substantial increases in population, household formation and disposable income will allow the localised retailing function to continue – although much of the benefit from the demographic changes will be lost to other areas
- The localised retailing function continues to be valued by the surrounding community
- Substantial large-scale development would be required to re-position Donnington DC – which is unlikely to come forward by 2011.