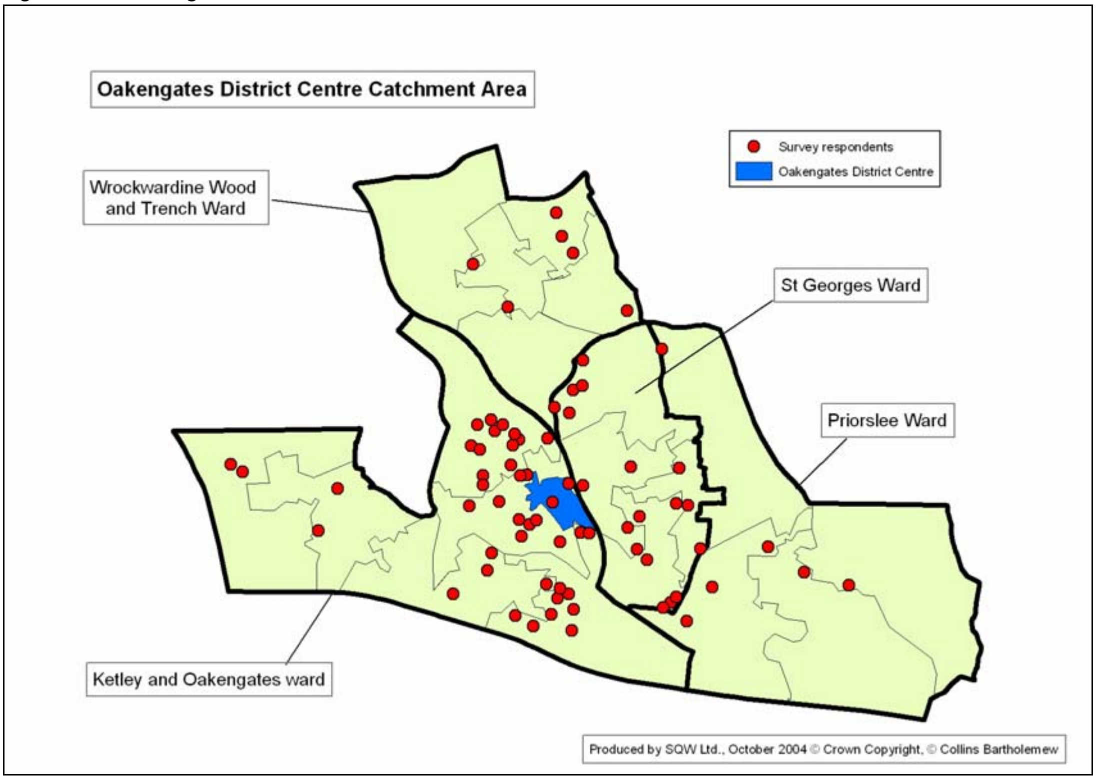
1 Oakengates District Centre Analysis

The catchment area

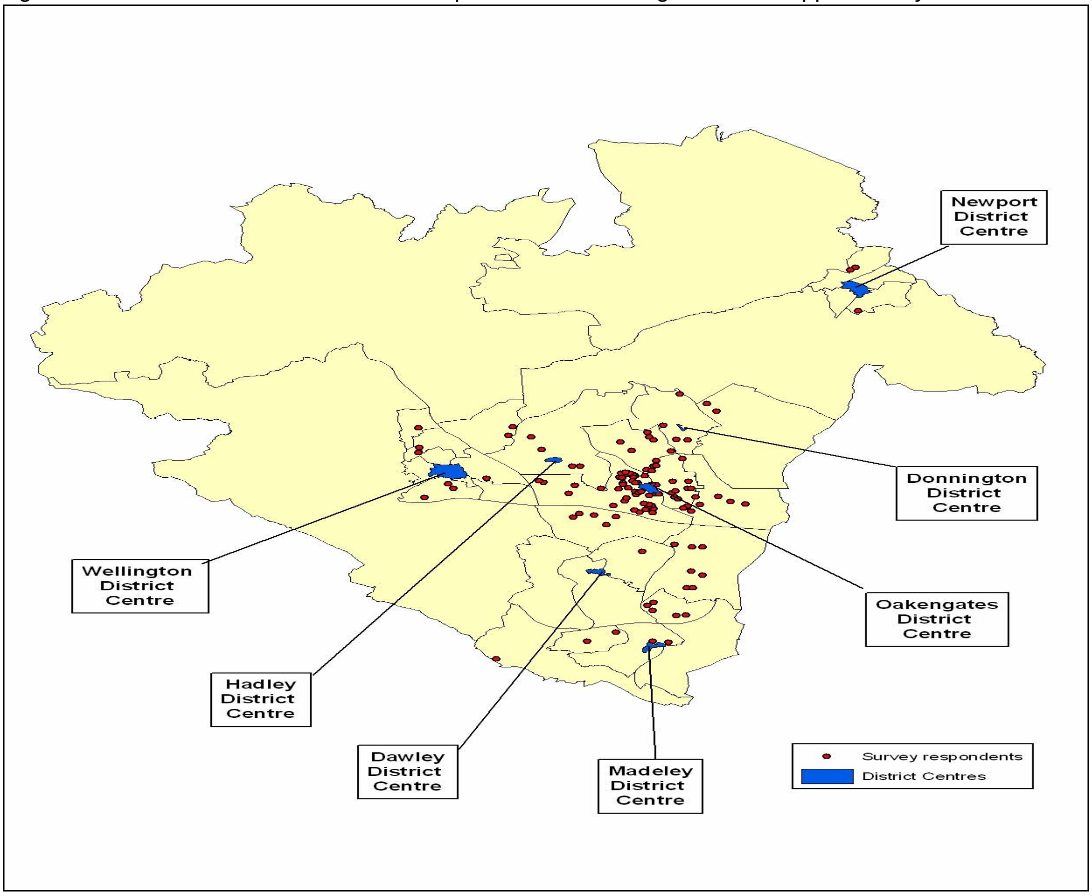
1.1 The catchment area for the Oakengates DC has been determined by postcode data from the shopper survey respondents. Respondents living in the four wards of Ketley and Oakengates, St. Georges, Priorslee and Wrockwardine Wood and Trench constitute 61% of the survey sample that provided full postcode information in Oakengates DC. These four wards, totalling some 27,992 residents, comprise the current core catchment area for Oakengates DC (Figure 1-1).

Figure 1-1 Oakengates District Centre Catchment Area



1.2 The catchment area for Oakengates DC encapsulates a relatively low proportion of the survey sample (61%), although it is clear from Figure 1-2 that the DC attracts a substantial number of shoppers from wider areas towards the West and South if the DC.

Figure 1-2 Location of residence for all respondents in Oakengates DC shopper survey



2 Socio-economic profile of Oakengates DC catchment area

High population density with ageing population

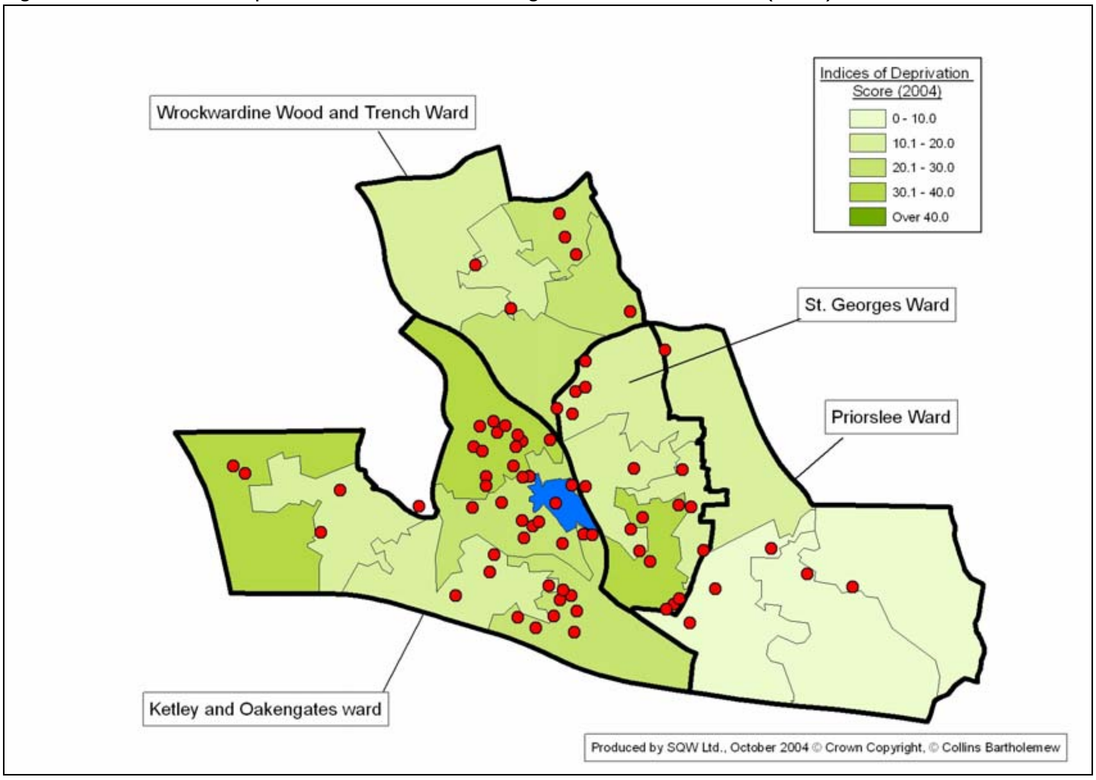
2.1 The population density of the Oakengates DC is almost four times the Borough average, with 20.7 people per hectare, rising to 30.9 people per hectare in the St. Georges ward.

2.2 The Oakengates catchment area has a slightly older population compared to Telford and Wrekin as a whole. The under 16 age group accounts for 21% of the population, and the 16-29 age group constitutes 17%; whereas 49% are aged 30-64 and 13% are aged 65 and over.

Some variation in deprivation levels – generally reflect Borough average

2.3 The overall Indices of Multiple Deprivation score for the Oakengates catchment area is 22.6, compared to an average of 21.8 across the Borough. As illustrated by Figure 2-1, there is some variation around the mean, ranging from 2.1 in the Priorslee ward to 32 in a pocket of St. Georges ward.

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



Diversity in qualification levels – residents of Wrockwardine Wood and Trench are poorly qualified, but a high proportion of graduates in Priorslee

2.4 Qualification levels for the Oakengates catchment area are slightly above average; 13.6% of residents aged 16-74 have a degree (or equivalent). Residents of the Priorslee ward are amongst the highest qualified in the Borough, with 28.1% holding a degree or above.

2.5 The proportion of residents without any qualifications in Oakengates (31.8%) is low compared to other DCs and the Borough average (32.7%). This figure masks considerable diversity across the catchment area; the proportion of residents without qualifications in the Wrockwardine Wood and Trench ward (37.7%) is over twice that of the Priorslee ward (16.5%).

High economic activity and employment rates in the Oakengates economy

2.6 Economic activity rates in the Oakengates catchment area are high; almost 70% are economically active, and 64.8% are in employment.

2.7 Only 2.7% of the 16-74 age group are unemployed, compared to 3.3% across Telford and Wrekin. The Job Seekers Allowance claimant count rate is 1.3%, which is also below the Borough average (1.6%).

2.8 The proportion of the 16-74 age group who are economically inactive (30.2%) is below average (31.3%), and 40.8% of which are retired.

Above average gross weekly earnings, but high proportion of residents in St. Georges ward are dependent on Income Support

2.9 Gross weekly pay (2003) for the Oakengates catchment area averaged at £335 for full time and part time employees, and £395 when taking only full time employees into account. These earning levels are above the average for the other DCs and the Telford and Wrekin average.

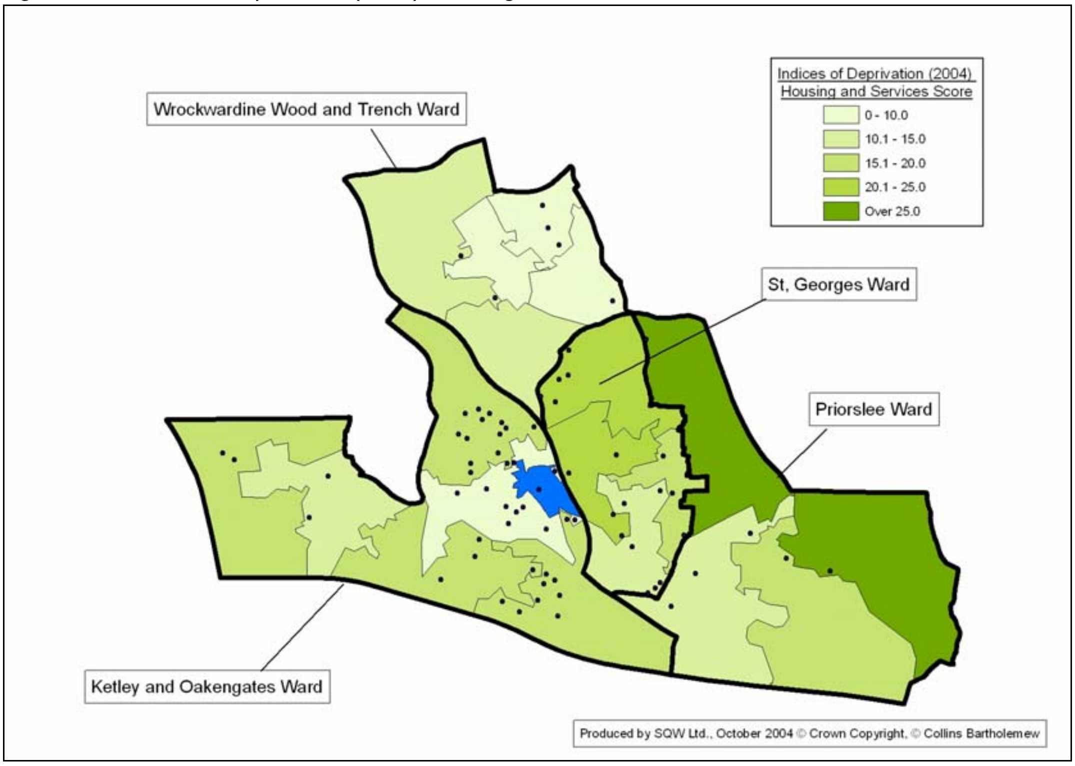
2.10 Just over 10% of the working age population is dependent on Income Support, although this varies from 3% in the Priorslee ward to 19% in the St.Georges ward.

Accessibility

2.11 One fifth of households in the Oakengates catchment area do not own a car, which is slightly less than expected. Almost half of all households have access to one car, and a further 28% have two cars.

2.12 Figure 2-2 illustrates a wide range of accessibility to housing and key services across Oakengates catchment area with an average score of 17.4, which is relatively low compared to other DCs. However, residents of the more peripheral areas of the Priorslee ward clearly experience challenges in terms of accessibility of housing and services.

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



Conditions of health largely reflect the wider Borough average; high Disability Allowance claimant rate in St. Georges ward

2.13 Levels of limiting long-term illness (17.9% of all people) across Oakengates catchment area very much reflect the Borough average, as do Incapacity Benefit Claimant rates (4.3%). Disability Allowance claimant rates (5.5%) are slightly higher than would be expected, inflated by almost 9% of residents in the St. Georges ward claiming Disability Allowance.

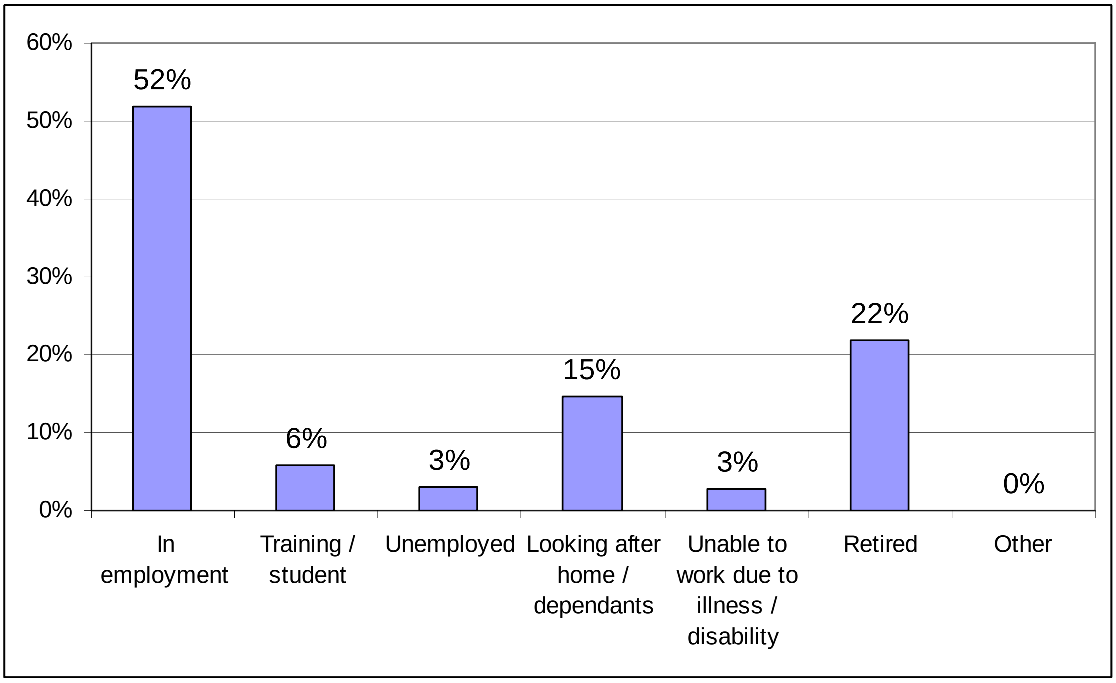
3 Shopper survey in Oakengates DC

Shopper profile

3.1 The 45-64 age group constitute the largest proportion of the shopper sample (38.2%), followed by the 25-44 age group (29.4%). Respondents at each end of the age scale are relatively under-represented, compared to the other DCs, with only 15% aged 16-24 and 17% aged 65 or over.

3.2 Over half of the respondents in Oakengates DC were in employment; the sample had one of the highest rates of full time employment compared to the other DC samples (see Figure 3-1).

Figure 3-1 Employment status of respondents in Oakengates DC



3.3 The proportion of respondents looking after their home / dependents (14.7%) was above average. Over one-fifth (21.8%) of the sample were retired.

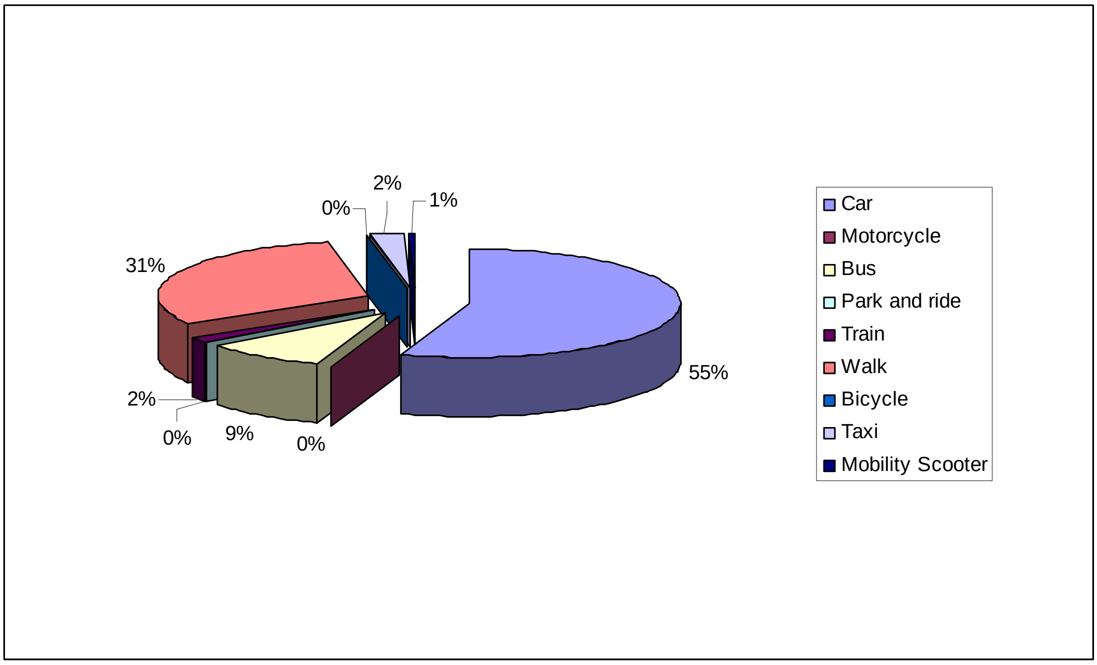
Usage

3.4 The shopper survey indicates that Oakengates is primarily used for its specialist shops (25.9%, compared to an average of 16.6% for other DCs) and top-up shopping (23.5%). Work was also a popular reason for respondents visiting the DC (12.9%). Respondents were almost twice as likely to visit Oakengates to eat out (5.9%) compared to other DCs. Going for a walk was the most popular secondary reason for visiting Oakengates.

3.5 The majority of respondents had travelled to Oakengates DC from home (87.1%), or work (9.4%). Visits tended to be short but regular. Over three-quarters of respondents spend one hour or less in the DC, and 67.1% visit twice a week or more.

3.6 It is clear from Figure 3-2 that over half the respondents travelled to Oakengates by car, slightly more than average across all DCs. Although walking and using the bus were also key modes of transport, respondents were less to take these modes of transport compared to other DCs.

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



3.7 Telford is the most popular other local shopping destination amongst shoppers in Oakengates; just over 70% of respondents regularly visit Telford town centre. Wellington and Donnington are also regularly visited by 45.9% and 14.7% of the sample respectively. The main reasons for visiting other DCs are main food shopping (80%), top-up shopping (56.7%) and specialist shops (61.8%). Financial services, hairdressers, the Post Office and restaurants also attract at least one quarter of respondents elsewhere.

Spend

3.8 Spend in Oakengates is relatively low; the amount spent is below the survey average in every category, except for eating out and drinking (see Table 3-1).

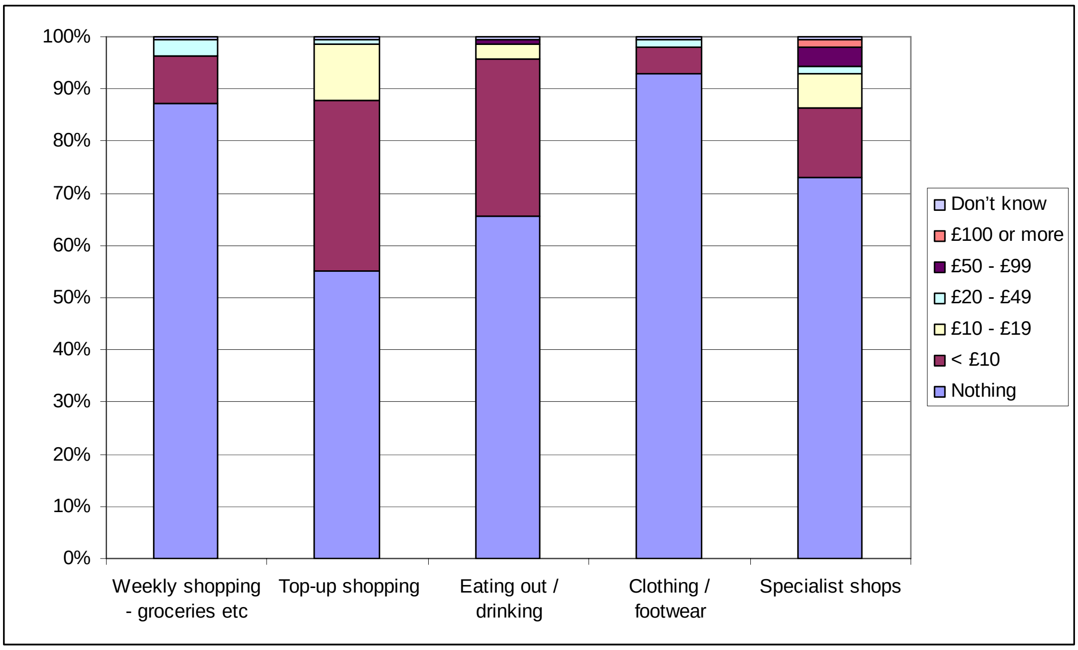
3.9 Just over 70% of respondents spent, or intended to spend, under £20, of which 64% spent less than £10. Almost 13% of the sample did not spend anything whilst in Oakengates, compared to an average of 9.5% across all DCs.

Table 3-1 Mean expenditure of shoppers in Oakengates DC

Spend type	Mean spend
Weekly shopping - groceries etc	1.46
Top-up shopping	3.47
Eating out / drinking	2.46
Clothing / footwear	0.75
Specialist shops	6.96

3.10 Figure 3-3 confirms the low level of spend by shoppers in Oakengates, particularly on weekly grocery shopping, and clothing / footwear.

Figure 3-3 - Respondent spend, by category



Night usage

3.11 Over 28% of respondents use Oakengates DC at night, compared to an average of 23.1% across other DCs, mainly to go for a drink (69.4%), to eat out (59.2%) and to get a take away (53.1%).

3.12 Approximately 71% of respondents do not visit Oakengates DC at night. The main reasons for cited for not visiting the DC in the evening are the lack of anything of interest (76.9%), followed by groups of youths causing a nuisance (12.4%).

3.13 The proportion of respondents who feel safe in the DC at night (77.6%) is below the average across all DCs (82.5%).

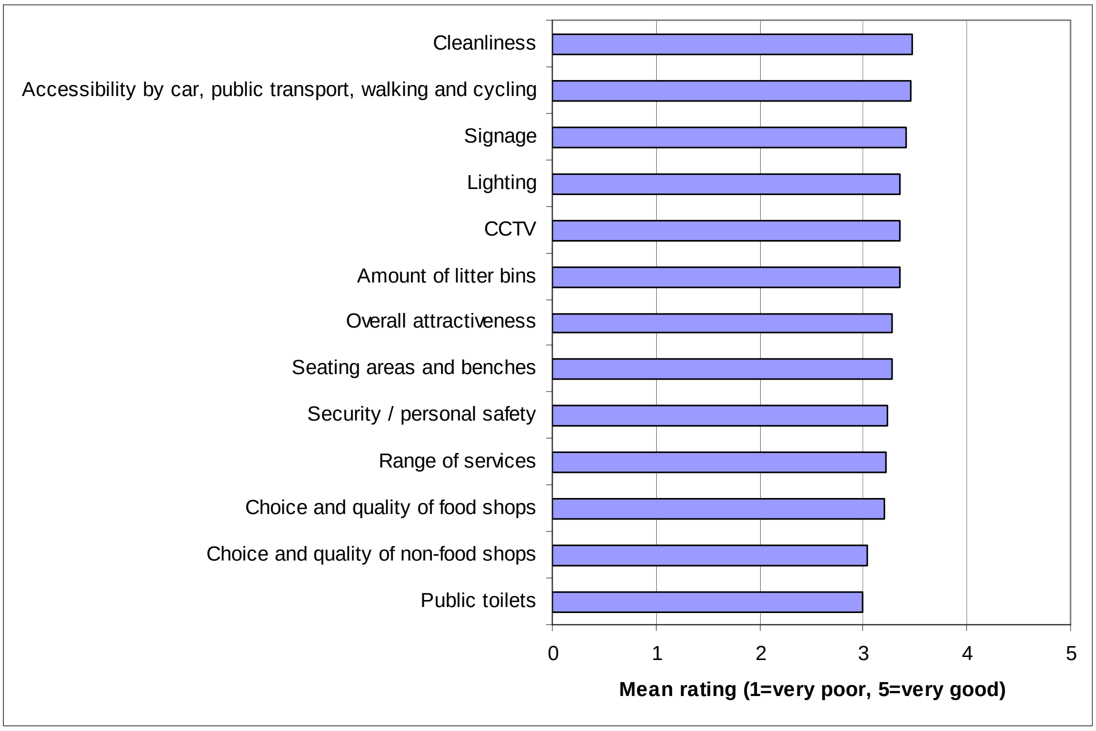
3.14 Youths causing a nuisance is the overriding reason respondents feel unsafe in the DC at night (89%), compounded by fear of aggressive behaviour (33%) and street robbery (33%).

Satisfaction ratings

3.15 Respondents in Oakengates were relatively positive towards what the DC currently has to offer, with only one category scoring slightly below average. The cleanliness and accessibility of Oakengates were rated as 'good' or 'very good' by over half the respondents.

3.16 Areas for improvement could include the choice and quality of shops, and the provision of public toilets, Figure 3-4.

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



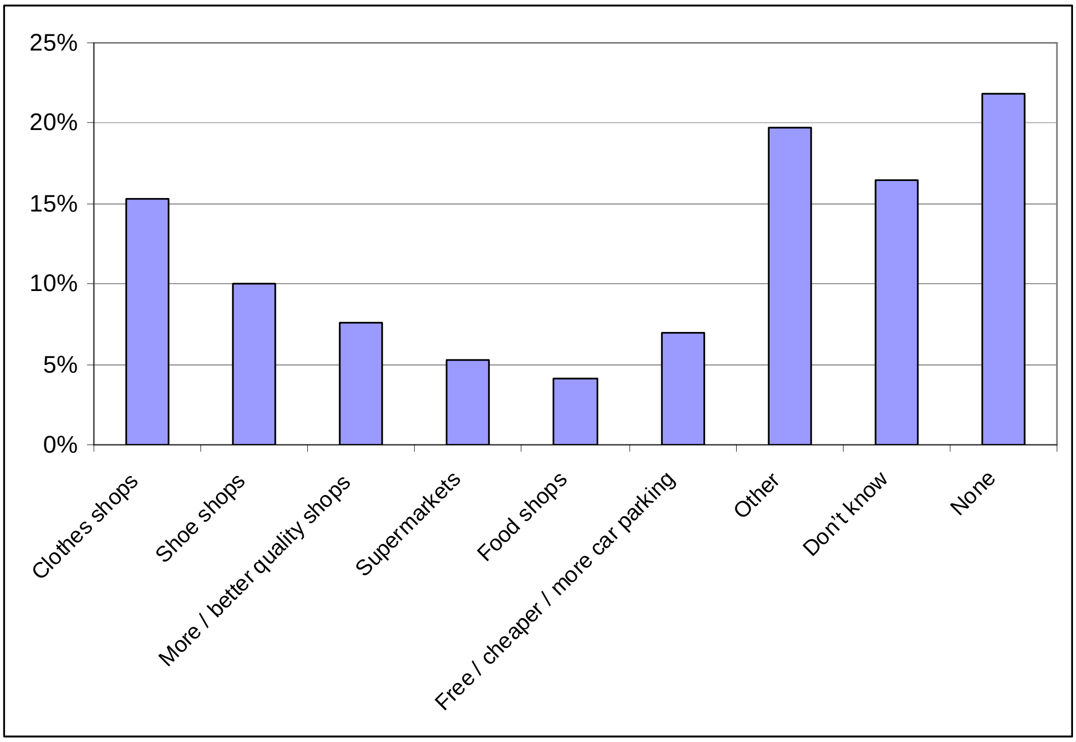
Suggestions for the future

3.17 Figure 3-5 overleaf illustrates the most common suggestions made by respondents to improve Oakengates DC in the future. The 'other' category includes all ideas which were raised by 2% or less of the sample.

3.18 Approximately one quarter of respondents would like to see more clothes and footwear shops in Oakengates, in addition to more / better quality shops and food outlets.

3.19 Almost 40% of respondents could not think of any factors which would improve Oakengates DC in the future.

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

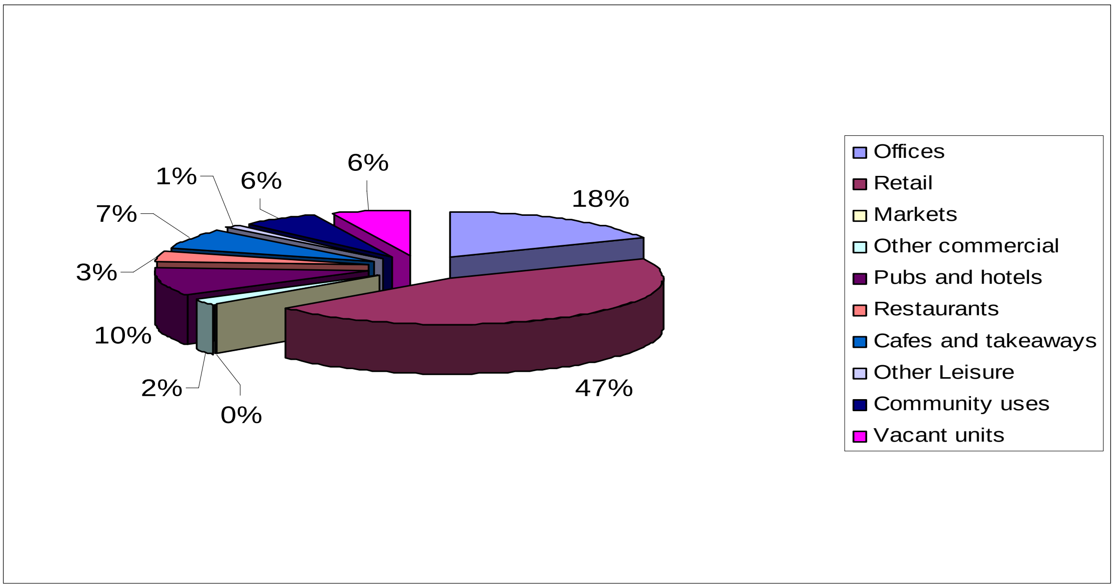


4 Retail activity

4.1 Figure 4-1 shows the current breakdown of commercial property space in Oakengates District Centre. It highlights that almost half of the space is devoted to retail and a quarter is dedicated to leisure uses.

4.2 The majority of units (83%) were judged to be of 'average' condition; with 12% (13 units) rated as 'poor' and 5% deemed to be in 'good' condition. No units were judged either 'very poor or 'excellent'.

Figure 4-1 - Commercial space usage in Oakengates



Local Property Market

4.3 Retailing in Oakengates caters for both the local population and people from the wider Telford area who are attracted by the specialty shops and the leisure offer, which includes a theatre, as well as a number of restaurants, pubs and clubs. The centre also has a small amount of office and residential usage. The office space offer has recently been improved with the the recent refurbishment of the theatre including the development of small office suites on the upper floors.

4.4 The Telford campus of the University of Wolverhampton is located at Priorslee within the Oakengates catchment area and houses approximately 500 students with others living in private rented accommodation in the local area. There are two industrial estates on the periphery of the centre as well as some warehouse retail units. Core data on the local property market is set out Table 4-1 below.

Table 4-1 – Oakengates property and market data

Oakengates Property Market	Key issues
Retail rents	£20 ZA in prime areas; £10 – 15 ZA in secondary areas
Retail use – supply and demand	Retail units comprise approximately 50,000 sq ft, with comparison retailing providing 35,000 sq ft of this. Whilst there are some vacant units, take-up is relatively strong
Office rents	£6 per sq. ft
Office use – supply and demand	Most of the office space in the centre comprises converted retail units but the recent refurbishment of the theatre has introduced small office suites on the upper floors. The proximity to Central Park dismisses large scale office use in the centre, but there does appear to be demand for small business space
Leisure rents	£20 ZA in prime areas; £10 – 15 ZA in secondary areas; £10 psf overall for nightclubs
Leisure use – supply and demand	The centre has a strong and varied leisure component, including pubs, clubs and restaurants as well as a theatre. Views differ on the level of impact that new leisure attractions in Telford Town Centre will have on Oakengates, but agents agree that Oakengates will lose some of its evening activity to Telford Town Centre
Residential values	Terraced houses (2 bed) - £103,000 Semi-detached houses (3 bed) - £120,000

Retailer Surveys - Comments on Oakengates

4.5 Retail interviews confirm that leisure and convenience retailing are the main reasons for visiting the centre. Over the last 5 years, activity in the centre has increased, largely because of improvements to the leisure offer. Retailers were of the view that proposals to provide bars and restaurants as part of the development in Telford Town Centre would have a significant negative impact on Oakengates. There is also considerable local concern about the impact of proposed car parking charges on the future usage of the centre. Retail responses also highlighted problems including:

- Anti-social behaviour in the DC in the evenings
- The uninviting present state of the Limes Walk shopping centre (although this has been improved recently through the redevelopment of the theatre)
- The poor quality of the public realm.

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, we have incorporated assumptions in connection with the retail and leisure proposals for Telford Town Centre. We understand that retail development is to increase by approximately 100,000 sq ft every 5 years commencing in 2007, with leisure uses, including cultural activity, to increase by at least 130,000 sq ft .

5.2 These developments, particularly the leisure proposals, are likely to have a significant impact on Oakengates - particularly given its proximity to Telford Town Centre – but the leisure development is not expected to commence until after the 2011 timescale used for this study. We have therefore assumed that within the 2011 timescale, Oakengates should not aim to provide a significant leisure offer that would compete with Telford Town Centre in the long-term (this may need to be formalised into a policy decision to protect the viability of both Telford Town Centre and Oakengates). Clearly, if proposals for Telford Town Centre change over time, the projections set out here would need to be reviewed - we would advise that development of the proposals and their relationship with Oakengates continue to be monitored.

5.3 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 or retail spend from catchment area residents made in Oakengates DC itself. These are set out in **Error! Reference source not found.** and **Error! Reference source not found.**.

Table 5-1 – Annual spend by Oakengates population (2003)

Oakengates District Centre	Total estimated annual turnover
Total composite spend	£148.92m
of which	
Retail spend	£104.80m
Leisure spend	£44.12m

5.4 Table 5-2 sets out the spend levels that occur within Oakengates District Centre itself. It will be seen that leisure uses generate the highest proportion of turnover within the centre, with comparison retailing comprising a third of all turnover. Oakengates is seen to offer a relatively good supply of retailing and leisure attractions, and draws customers from the local area, including the student population based in Priorslee, as well as people from outside the area.

5.5 Externally generated spend within Oakengates has therefore been taken into account into the turnover levels shown below, which is split between the 3 main categories of spend and floorspace.

Table 5-2 – Total Oakengates turnover and floor space

Oakengates District Centre	%'age Spend between Sectors	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total Oakengates Turnover		£53.48m	74,000
Comparison Goods	33%	£17.53m	34,000
Convenience Goods	22%	£11.71m	16,500
Leisure Spend	45%	£24.23m	23,500

Trend analysis – demographics / floorspace

5.6 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 Oakengates population base, disposable income levels, the composition of households, etc. These are set out in the table below.

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

Population	1991	2001	Change	% Change
Total	22,896	27,992	5,096	22%
Split for Age				
under 16	4,663	5,928	1,265	27%
16-29	4,751	4,764	13	0%
30-64	10,337	13,623	3,286	32%
65+	3,164	3,677	513	16%
Split by economically active				
Total active	11,890	14,266	2,376	20%
Full-time	8,191	9,699	1,508	18%
Part-time	1,756	2,376	620	35%
Split by housing tenure				
Total households	8,796	11,309	2,513	29%
Total owner-occupier	6,198	8,360	2,162	35%
Total private sector rental	421	470	49	12%
Total public sector rental	2,197	2,151	-46	-2%
Income	**2002**	**2003**	**Change**	**% Change**
Total gross weekly pay	328	335	7	2%

5.7 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 almost a quarter over the 10 years to 2001. Within the population base, the greatest increases have been in the under 16 and 30-64 age groups, whilst the 16-29 working age group has remained largely unchanged.

5.8 There have also been significant moves within the housing stock. Total households have increased by a third and there have been increases within the owner occupied stock in particular, and in the total private rented sector. Conversely, the numbers of property rented by the public sector have declined slightly. Finally, income levels have increased marginally over a one-year period.

5.9 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 the increased number of households and these have been utilized to increase the overall expenditure levels anticipated within Oakengates over the next five years.

Table 5-4 – Population and income projections (2011)

Population	**2001**	**2011**	**Change**	**% Change**
Total	27,992	34,222	6,230	22%
Split for age				
under 16	5,928	7,536	1,608	27%
16-29	4,764	4,777	13	0%
30-64	13,623	17,954	4,331	32%
65+	3,677	4,273	596	16%
Split by economically active				
Total active	14,266	17,117	2,851	20%
Full-time	9,699	11,485	1,786	18%
Part-time	2,376	3,215	839	35%
Split by housing tenure				
Total households	11,309	14,540	3,231	29%
Total owner-occupied	8,360	11,276	2,916	35%
Total private sector rental	470	525	55	12%
Total public sector rental	2,151	2,106	-45	-2%
Income	**2002**	**2003**	**Change**	**% Change**
Total gross weekly pay	328	335	7	2%
Increase in retail expenditure for households				
Owner - occupied		£7,417		£21.62m
Market rent		£12,379		£0.67m
Total increased expenditure				**£22.30m**

5.10 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 (based on their individual medium projections), have been re-run to take account of the above increases. This has resulted in a revised level of total turnover for Oakengates as set out in Table 5-5 – 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. Whilst there is an increase in turnover, it is assumed that the total existing floorspace will absorb the increased activity taking place, with all vacant units being occupied.

Table 5-5 – Medium projections

Oakengates District Centre MEDIUM PROJECTIONS 2011	%'age Spend between Sectors	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total Oakengates Turnover		£62.67m	81,000
Comparison Goods	32%	£20.34m	36,000
Convenience Goods	22%	£13.65m	19,000
Leisure Spend	46%	£28.67m	26,000

Low Projections

5.11 In order to assess the potential for low projections within the centre the above performance characteristics have been re-assessed in light of the proposed development in Telford Town Centre, its attraction to other centres and the implications of this for Oakengates. Consequently, we have reduced both the amount of retained spend that Oakengates core catchment areas contribute to turnover as well as that provided by the other centres. The low scenario for the other centres has also been captured in this projection. As already mentioned, it is assumed that the level of retail and leisure activity declines in Oakengates, although its appeal as a local centre (for convenience retailing, etc.) will continue. Consequently, there will be a reduction in the number of retailing units, it is assumed that in particular comparison, and leisure outlets suffer the greatest decline.

5.12 These projections have been re-cast and result in the following turnover and floorspace levels for the centre in this scenario as at 2011, see Table 5-6.

Table 5-6 – Low projections

Oakengates District Centre Low PROJECTIONS 2011	%'age Spend between Sectors	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total Oakengates Turnover		£41.39m	58,000
Comparison Goods	32%	£13.18m	26,000
Convenience Goods	26%	£10.57m	15,000
Leisure Spend	43%	£17.63m	17,000

High Projections

5.13 As mentioned, Oakengates future role, particularly as a centre providing evening entertainment, is threatened by the proposed development at Telford Town Centre, but as shown in the medium scenario, the increase in households and disposable income by 2011, will allow Oakengates to enhance its current position. To allow Oakengates to achieve a firmer future role and solidify its position as an active local centre beyond 2011, would require a number of initiatives to be undertaken, including:-

- Releasing land / encouraging / aiding residential development in the centre – this could occur on upper floors of retail units or on existing car park sites at New Street / Slaney Street

- Releasing land / aiding / investing in development of small business units, ideally with dedicated car parking space – again, this could occur on the existing car park sites at New Street / Slaney Street.

5.14 Clearly, any other commercial opportunities that Oakengates can secure in the period to 2011 should be captured – the location of which could be on the sites mentioned above, with the possible impact of this being to transfer the initiatives above to sites on the edge of the current core centre.

5.15 The high scenario also incorporates the high projections assumed for the other centres. The resulting figures with regard to estimated turnover and required floor space within the centre are set out in Table 5-7 below. Whilst an estimate of the total amount of new office floorspace that could be developed on the sites mentioned above has been provided, it is not possible to provide turnover levels for office based businesses as this information is not available.

Table 5-7 – High projections

Oakengates District Centre High PROJECTIONS 2011	%'age Spend between Sectors	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total Oakengates Turnover		£62.78m	88,000
Comparison Goods	32%	£20.35m	36,000
Convenience Goods	22%	£13.66m	19,000
Leisure Spend	46%	£28.76m	26,000
Office Space			7,000

5.16 It can be seen that these are broadly similar to the medium projection, but this scenario allows Oakengates to begin to re-position itself by 2011 in order to mitigate the likely long-term impact of the developments at Telford Town Centre.

Prognosis for Oakengates DC

- Current facilities in Oakengates attract customers and users from the local area as well as further afield – this is particularly the case for its leisure offer

- The proposed development at Telford Town Centre will have a negative impact on Oakengates leisure provision which are due to commence in 2012 – beyond the timescale for this study

- If the current leisure proposals for Telford Town Centre are implemented, Oakengates needs to begin to re-position itself for its long-term future

- There is potential for residential, other commercial use, including small business units to be provided in the centre - if land can be released and support given to change of uses.