Black Country Parking Study

Stage 2 Report

Sandwell Metropolitan Borough Council

November 2022

Delivering a better world

Quality information

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Glossary

AAP	Area Action Plan
BCCS	Black Country Core Strategy
BCP	Black Country Plan
BCTOG	Black Country Transport Officers Group
CAV	Connected Autonomous Vehicles
CAZ	Clean Air Zone
CEN2	2021 Draft Black Country Plan Policy - Strategic Centres
CEN3	2011 Black Country Core Strategy Policy - Growth in Strategic Centres
CEN8	2011 Black Country Core Strategy Policy - Car Parking in Centres
COVID19	Coronavirus Disease
DPD	Development Planning Document
EV	Electric Vehicle
MaaS	Mobility as a Service
MBC	Metropolitan Borough Council
NPPF	National Planning Policy Framework
ORCS	On-Street Residential Chargepoints Scheme
PPG13	Planning Policy Guidance Note 13: Transport
PT	Public Transport
SPD	Supplementary Planning Document
TfWM	Transport for West Midlands
TRAN5	2011 Black Country Core Strategy Policy - Influencing the Demand for Travel and Travel Choices
TRAN6	2021 Draft Black Country Plan Policy - Influencing the Demand for Travel and Travel Choices
TRAN7	2021 Draft Black Country Plan Policy - Parking Management
ULEV	Ultra-Low Emission Vehicle

1 Introduction

1.1 Background

1.1.1 In 2020 AECOM was commissioned to undertake a Black Country Car Parking Study to support and inform a justified policy approach to parking in the Black Country Strategic Centres. The study is part of a suite of reports prepared to inform the Black Country Plan. The Black Country Plan period spans from 2026 up to 2039.

1.1.2 The parking study focuses on the Tier 1 and 2 centres listed in **Table 1-1** below.

Table 1-1: List of Black Country Tier 1 And Tier 2 Centres

Local Authority	**Dudley MBC**	**Sandwell MBC**	**Walsall MBC**	**City of Wolverhampton**
Strategic Centres (Tier 1 Centres)	Brierley Hill	West Bromwich	Walsall	Wolverhampton
Town Centres (Tier 2 Centres)	Dudley Halesowen Stourbridge	Bearwood Blackheath Cape Hill Cradley Heath Great Bridge Oldbury Wednesbury	Aldridge Bloxwich Brownhills Darlaston Willenhall	Bilston Wednesfield

1.1.3 The parking study was commissioned by Sandwell Metropolitan Borough Council (MBC) on behalf of the Black Country Transport Officers Group (BCTOG), consisting of Dudley MBC, Sandwell MBC, Walsall MBC and the City of Wolverhampton. BCTOG formed the Steering Group for this work.

1.1.4 The agreed scope included a two-stage study approach with both stages involving stakeholder engagement to inform and guide the execution and study outputs. The main objective was to support development of a sound Plan with robust, evidence-led policies specifically related to parking.

1.1.5 The Stage 1 study, completed in August 2021, included a comprehensive policy and strategy review, identified current conditions and issues so far as practicable, explored management and enforcement, and looked at future trends and opportunities. It included a high level review of the current policy approach as set out in the adopted Black Country Core Strategy (BCCS) 2011-2026 and examined issues around the impact of current local policy application and enforcement practices.

1.1.6 This set the scene, investigating various car park policy and management options and enabling consideration of how to bring greater consistency across the Black Country Tier 1 and 2 centres, balanced against a need for local flexibility at certain locations where necessary.

1.1.7 The scope of the Stage 2 study was revised from the original brief to take account of the outcome of the Black Country Draft Local Plan Regulaton 18 consultation completed in October 2021, to examine the relevant policies as they emerged and to provide more focused narrative and analysis on the proposed policy approach.

1.1.8 Stage 2 offers additional information and advice on the proposed policy approach to car parking in the Black Country Strategic Centres to assist the development of the Black Country Plan and to guide decision-making on relevant individual proposals.

1.2 Stage 2 Revised Scope

1.2.1 Based on the Stage 1 report findings, AECOM has undertaken some further research and analysis making use of the latest information available. This additional analysis includes a review of the Black Country Centres Study (2020 and updated 2021), Household Survey results from 2009 and 2019, Black Country Draft Local Plan Consultation representations (October 2021) and a look into a number of case studies from out of town retail centres elsewhere in England.

1.2.2 This Stage 2 report is structured around four discrete tasks; Task 1 - Baseline, Task 2 - Information and Evidence, Task 3 - Policy Analysis and Advice, and Task 4 - Appraisal of the Emerging Policy Approach including a look at the level of consistency and linkages between policy provisions.

1.2.3 Further details are provided below.

Task 1 - Baseline

1.2.4 The baseline task provides a concise summary of the existing approach to car parking as set out in the Core Strategy adopted in 2011, with specific focus on policies CEN3, CEN8 and TRAN5. This makes use of information within the policy and strategy review undertaken as part of the Stage 1 study, providing more context around the justification for the approach taken at the time of BCCS preparation.

Task 2 - Information And Evidence

1.2.5 Additional information and supporting evidence has been gathered under the following three sub-tasks.

Task 2a - Comparative Analysis

1.2.6 Stage 1 findings have been summarised, and a technical review and comparative analysis of parking in centres has been undertaken. This offers further understanding and a qualitative assesessment of similarities and differences between approaches in Strategic Centres, including car park operation and use.

1.2.7 The latest Black Country Centres Study and the Stage 1 parking study, both forming part of the developing Black Country Plan evidence base, have been reviewed in parallel. Further consideration has been given to the latest parking-related data for the Strategic Centres compared with 2011 BCCS provisions and also set in the context of the Draft Plan policies, with additional information identified that can inform future parking policy and help manage demand for parking.

Task 2b - Evidence Of Transition

1.2.8 Analysis of additional information and evidence provided within the latest Black Country Centres Study and Household Surveys, undertaken in 2009 and 2019, has been undertaken. This considers any data that may impact on future parking needs such as demonstrable mode shift over time or an apparent change in attitudes to parking in the 10 year period since adoption of the extant Plan.

Task 2c - Case Studies

1.2.9 The final aspect of Task 2 is a case study review to identify any evidence of possible links between mode shift and significant investment in public transport, for example new infrastructure, in other locations across the country that share similarities with Black Country centres.

1.2.10 Analysis of publicly available data for appropriate case study sites been undertaken to establish if mode shift away from the private car and towards more sustainable modes has resulted from the public transport investment in those areas.

Task 3 - Policy Analysis And Advice

1.2.11 Using information compiled under Tasks 1 and 2, Task 3 has involved the following activities:

i. An evaluation of BCCS Policy CEN3 and the pre-conditions applied to Merry Hill specifically (particularly precondition c which sought to introduce a car parking management regime including the use of parking charges before additional comparison retail floorspace could be brought into operation).

ii. Consideration of the latest Black Country Centres Study (in particular paragraphs 12.25, 12.26 and 12.9) and the emerging policy approach set out by CEN2 of the Regulation 18 Consultation Draft Black Country Plan.

iii. Provision of high level advice on the management of car parking demand, shared use of parking in centres and what parity in approach between the centres might look like. This considers how parking policies can support the wider Centres and Transport policy objectives of the Draft Plan.

iv. A Stage 2 Workshop to consider work done to date and to seek further Local Authority input. The workshop was held on 4 April 2022 and notes are presented in **Appendix D**.

Task 4 – Appraisal of the Emerging Policy Approach and Policy Links

1.2.12 AECOM’s final appraisal focuses on the emerging policy approach as set out in draft policies CEN2, TRAN6, and TRAN7 and the consistency of proposed policy wording. This considers the representations made during the Regulation 18 consultation that closed in October 2021.

1.2.13 This assessment has sought to draw out links between the evidence gathered over the course of both stages of the parking study and the policies set out in the Draft Plan, with an emphasis on management of demand for parking through mode shift and avoiding car parking being viewed as a competition tool between centres. The aim has been to ensure consistency between policies for centres, car parking and transport and to identify appropriate ways that any disparities can be addressed.

2 Task 1 - Baseline

2.1.1 This section provides a concise summary of the existing approach to car parking policy as set out in the current Black Country Core Strategy and the main justification for related policies at the time of Plan preparation. This utilises information from the policy and strategy review completed during Stage 1 and additional information provided by Black Country Authorities to inform Stage 2.

2.1.2 The BCCS adopted in 2011 includes the following policies that are directly related to car parking strategy; *CEN3 - Growth in the Strategic Centres, CEN8 - Car Parking in Centres* and *TRAN5 - Influencing the Demand for Travel and Travel Choices.*

2.1.3 It is noted that the Plan is designed to set the in-principle approach across the Black Country, but it is the case that subsequent Tier 2 plans should provide the detail under that agreed framework. This parking study does not examine existing Tier 2 policies in detail, although the Stage 1 study sought to identify broadly how Tier 1 strategy appears to have been interpreted and applied at a local level over time.

2.2 CEN3 – Growth in the Strategic Centres

2.2.1 The relevant section of Policy CEN3 within the adopted 2011 Black Country Core Strategy states:

> *'New comparison retail development within Merry Hill (part of Brierley Hill Strategic Centre) will be carefully controlled so that no additional comparison retail floorspace is brought into operation until all the following conditions are met:*
>
> *a) Adoption by the Local Planning Authority of the Area Action Plan for Brierley Hill;*
>
> *b) Implementation of improvements to public transport, including completion of initiatives of equivalent quality and attractiveness to the proposed Metro extension from Wednesbury to Brierley Hill, and improvements to bus services connecting the centre with other locations in the Black Country and beyond, and other measures to improve accessibility to and circulation within the centre by non-car modes;*
>
> *c) Introduction of a car parking management regime including the use of parking charges compatible with those in the region's network of major centres.'*

2.2.2 Policy CEN3 as a whole relates to managing growth within the capacity of the Black Country Strategic Centres (Brierley Hill, Walsall, West Bromwich and Wolverhampton) in terms of comparison shopping, convenience retail, office development and other centre uses. The policy approach was developed on the basis of evidence-led capacity analysis undertaken in the context of economic circumstances at the time.

2.2.3 It dictates that any additional comparison retail floorspace provided at Merry Hill specifically would first require the adoption of the Area Action Plan (AAP) for Brierley Hill, realisation of improvements to public transport and, crucially, will act as a trigger for the introduction of a car parking management regime to include the use of parking charges aligned with those applied in the region's other Strategic Centres.

2.2.4 At the time this policy was formed it was anticipated that there could be significant long-term growth in comparison and convenience retail across the region, with Merry Hill singled out in particular as an area requiring greater control. The intention was to ensure there would not be an over concentration of provision in any one strategic centre to the detriment of other centres, particularly the non-strategic centres in the region which are dependant on their convenience role and rely on investment for regeneration purposes.

2.3 CEN8 - Car Parking in Centres

2.3.1 Policy CEN8 within the adopted 2011 Black Country Core Strategy states:

> *'(a) Pricing*
>
> *The pricing of parking will not be used as a tool for competition between Strategic Centres.*
>
> *A lower pricing regime may be identified for Town Centres and District and Local Centres.*
>
> *(b) Type of Parking*
>
> *The amount and charging of publicly available long stay parking in centres will be managed to ensure a balance between provision of long stay parking and encouraging commuters to use more sustainable modes.*
>
> *Except where there is an accepted need for secure dedicated provision, car parking within or on the edge of Strategic Centres, Town centres and District and Local Centres will generally be required to be available to the public to serve the centre as a whole.*
>
> *Adequate provision will be made in centres as a whole and in new parking facilities for all types of users, including those with reduced mobility, cyclists and users of powered two wheelers.*
>
> *(c) Maximum Parking Standards*
>
> *The application of maximum parking standards will be consistent with PPG 13 and any subsequent government guidance, which, in the case of long stay provision, will encourage reduced levels of provision where public transport accessibility is highest.*
>
> *A lower maximum standard for off street parking will be identified for development within Town Centres and District and Local Centres where the parking provision is to serve the centre as a whole.'*

2.3.2 CEN8 identifies three key mechanisms in the context of car parking to help manage demand for road space and influence travel choices. Although it is not stated explicitly, this policy sought to support the strategic transport priority to achieve a shift in favour of sustainable modes of transport, with the BCCS advising that the correct balance needed to be found between management of car parking and avoiding a situation where new development was deterred.

2.3.3 It was also noted at the time of Plan preparation that non-strategic centres were increasingly struggling to compete with the more dominant higher order centres and out of centre shopping provision, consistent with the justification provided for CEN3.

2.3.4 Ultimately, the BCCS directed that parking provision in new developments within centres under this framework would be managed through DPDs, SPDs, Town Centre Strategies and other non-statutory documents (Tier 2 plans).

2.4 TRAN5 – Influencing the Demand for Travel and Travel Choices

2.4.1 TRAN5 policy within the adopted 2011 Black Country Core Strategy states:

'The Black Country Local Authorities are committed to considering all aspects of traffic management in the centres and wider area in accordance with the Traffic ManagementAct 2004.

The priorities for traffic management in the Black Country are:

- *The pricing of parking - ensuring that it is not used as a tool for competition between centres;*
- *The type of parking – ensuring that where appropriate long stay parking is removed near to town centres to support parking for leisure and retail customers and encourage commuters to use more sustainable means and reduce peak hour traffic flows;*
- *Maximum parking standards – ensuring that a consistent approach to maximum parking standards is enforced in new developments as set out in supplementary planning documents;*
- *The location of parking – by reviewing the location of town centre car parks through the 'Network Management Duty Strategy' to ensure that the flow of traffic around the town centres is as efficient as possible;*
- *Identifying appropriate strategic and local Park and Ride sites on current public transport routes to ease traffic flows into centres;*
- *Working together with the rest of the region to manage region-wide traffic flows through the West Midlands Metropolitan Area Urban Traffic Control (UTC) scheme and further joint working;*
- *Promoting and implementing Smarter Choices measures that will help to reduce the need to travel and facilitate a shift towards using sustainable modes of transport (walking, cycling, public transport, car sharing).'*

2.4.2 TRAN5 is a statement of commitment from the Black Country Authorities setting out the in-principle approach to parking as a traffic management tool with the intention being that Tier 2 plans would provide detail on these themes listed within the BCCS as the overarching framework. The policy approach at the time was based on a need to find the right balance between encouraging sustainable travel whilst ensuring good parking provision where needed.

2.4.3 This policy fully aligns with CEN8 and the requirement that pricing of parking not be used to create competition, removing or discouraging long-stay parking to encourage commuters to use sustainable transport and consideration of consistent maximum parking standards.

2.4.4 It is noted that the monitoring indicators for TRAN5 include for checks on the number of long stay parking spaces within Strategic Centres, with targets set to reduce levels of long stay provision over baseline by 2026 and ensure any new publically owned long stay parking would be located in peripheral locations and town centres to further encourage the use of sustainable modes.

3 Task 2 – Information and Evidence

3.1.1 Task 2 builds on the evidence gathered during Stage 1 of the parking study and includes a review of all available information and data. This section revisits current car parking provision in the Strategic Centres and offers a comparison with the 2011 Black Country Core Strategy and the 2021 Consultation Draft Black Country Plan provisions respectively.

3.1.2 Additionally, raw data from household sample surveys undertaken in 2009 and 2019 has been examined to establish whether the data available suggests a transition towards sustainable transport in order to aid understanding of the qualitative role of car parking in the region.

3.2 Task 2a – Comparative Analysis

2011 Black Country Core Strategy Review

3.2.1 An initial comparison has been made between the 2011 BCCS provisions which set the in-principle approach for car parking across centres, as summarised in Task 1, and both the strategic and operational situation as it stands within each local authority area. Specifically, this is a review of current conditions against extant BCCS policies *CEN3: Growth in Strategic Centres, CEN8: Car Parking in Centres* and *TRAN5: Influencing the Demand for Travel and Travel Choices.*

3.2.2 The position of each local authority as of 2021 with regards its second tier parking policy and strategy is outlined in **Table 3-1**. It should be noted that there are some data gaps, information held by the authorities is not consistent between districts and approaches also changed in response to particular needs arising from the pandemic.

Table 3-1: Local Parking Policy And Strategy

		Year	Status
Dudley	Dudley Parking Strategic Review: Working Paper 2 - Evidence Gathering and Analysis	2018	Final
	Dudley Parking Standards Supplementary Planning Documents (SPD)	2017	Adopted
Wolverhampton	Wolverhampton City Centre Car Parking Strategy	2016	Final
	City Centre Strategic Car Parking Review	2012	Final
	Future Generations: Our Climate Commitment	2020	Final
Walsall	Walsall Town Centre Parking Strategy	2017	Adopted
	Walsall Council Parking Strategy	2008	Adopted
Sandwell	West Bromwich Town Centre Car Parking Strategy	2003	Adopted
	Sandwell Parking and Traffic Enforcement Policy	2017	Adopted
	The Preparation of Transport Assessments and Travel Plans	2006	Adopted

CEN3: Growth In Strategic Centres

3.2.3 **Table 3-2** confirms the key provisions of *CEN3: Growth in Strategic Centres* and compares this with pertinent information on current local conditions gathered from policy and strategy documents including any supporting evidence available.

Table 3-2: CEN3: Growth In Strategic Centres Compared to Current Local Approach

CEN3: Growth in Strategic Centres

- *The Strategic Centres of Brierley Hill, Walsall, West Bromwich and Wolverhampton will seek to secure an appropriate share of comparison and convenience retail and office development to ensure investment and non car mode share. Edge of centre retail exceeding 500sqm acceptable only with satisfactory impact assessment.*
- *No additional comparison floor space to be brought into operation at Merry Hill until:*
  - *a) Adoption of the Brierley Hill Area Action Plan.*
  - *b) Public transport improvements are implemented, including Metro or equivalent.*
  - *c) Car parking management is introduced including compatible charges.*

Current Approach (including management practice, where data is available)

Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton
In addition to focused growth around public transport interchanges, Dudley identify the role that redevelopment of surface car parking, to be replaced by multi-storey and underground car parks where possible, could play.*(Draft Brierley Hill Area Action Plan, 2019).* The AAP acknowledges that there is high car dependency at Merry Hill and The Waterfront, and there is a need for further transport and connectivity improvements. Further improvements are being identified to enhance the Brierley Hill High Street offer.	*West Bromwich town centre car parking strategy (2003)* focuses on short stay parking to support retail and commercial activity and ensure public accessibility. The strategy seeks to restrict long-stay parking provision.	Walsall's current policies seek to provide sufficient additional parking in the town centre to allow it to remain competitive for office, retail and leisure investment. *(Walsall MBC).* Low levels of new development proposed in Walsall, with no future employment allocated. Development is unlikely to impact future parking demand. *(Walsall MBC and Walsall Site Allocations Documents and the Walsall Town Centre AAP, adopted in 2019).*	The redevelopment of under-used surface car parks (and introduction of multi-storey to maintain net parking provision where appropriate) is part of local strategy. *(Wolverhampton's Parking Strategy).* A phased approach seeks to minimise the impact that may occur on future parking demand related to significant development levels that could come forward within the centre. Car parking is to be maintained at a level to support regeneration and charging is linked to viability. Current policy also seeks to encourage mode shift where possible. *(City of Wolverhampton).*
Dudley has significant levels of residential development planned in the centre. *(Dudley MBC).*	Housing development centred around West Bromwich with an estimated additional housing capacity of 500-1,000 homes. This is considered unlikely to affect parking in the centre. *(Sandwell MBC).*	Future carry-forward housing and employment developments are being directed towards Walsall town centre, Bloxwich and Willenhall. *(Walsall MBC).*	*Wolverhampton City Centre Area Action Plan (2016)* supports residential provision in the city centre, including empahsising use of upper floors and additional potential capacity on mixed-use sites (Policy CC7). This has meant that new residential-led schemes are coming forward such as in the Canalside Quarter and former Royal Hospital site.

3.2.4 CEN3 highlights the need to manage growth in Strategic Centres and encourage access by non car modes. The review of current policy and practice at a local level shows that each authority is seeking to better manage long-stay car parking provision and encourage more sustainable travel, especially for commuter journeys into centres, although the detail provided and terminology used differs, depending on local circumstances.

3.2.5 CEN3 includes direct reference to Merry Hill and this is only reflected in car parking policy documents prepared in Dudley. Other aspects relevant to CEN3 such as public transport improvements, active travel measures, car parking management including charges are all considered to some extent across all four of the districts.

3.2.6 The analysis also highlights that appropriate provision (location, type and quantity) of short stay parking to support commercial, retail and leisure development in Strategic Centres is a clear priority across the four districts but again the approach taken differs between authorities.

CEN8: Car Parking In Centres

3.2.7 **Table 3-3** considers the current parking situation compared with *CEN8: Car Parking in Centres,* with pertinent information on current local conditions gathered from policy and strategy documents including any supporting evidence available.

Table 3-3: CEN8: Car Parking In Centres Compared to Current Local Approach

CEN8: Car Parking in Centres

- *Pricing is not to be used to create competition between Strategic Centres, lower pricing regime may be identified for Town Centres and District and Local Centres.*
- *Management of long and short stay parking to achieve an appropriate balance.*
- *Provision in centres and new parking facilities for all users including reduced mobility, cyclists and motorcycles.*
- *Encourage more sustainable modes.*
- *Application of maximum parking standards (based on superseded PPG13) and a lower standard for off-street parking in centres.*

Current Approach (including management practice, where data is available)			
Dudley MBC	**Sandwell MBC**	**Walsall MBC**	**City of Wolverhampton**
Acknowledged that car parking can assist in regulating traffic flow and assist traffic management as well as support the vitality of centres and encourage more sustainable travel. *(Dudley Parking Strategic Review).*	*West Bromwich Parking Policy (2003)* seeks to restrict and reduce long stay parking to maximise public transport, whilst ensuring that the car parks are attractive, convenient and safe to support growth in the town centre.	Notes approach should be consistent with national and regional policy and parking should be of a quality and quantity to support the town centre viability. Supports management of long stay parking to encourage sustainable travel and ensuring short stay car parks support retail and leisure. *(Walsall Town Centre Car Parking Strategy, 2017).*	Suggests that charges should be comparable with neighbouring and competing towns and cities – focus on long stay at edge of centre and short stay in centre. The Parking Strategy outlines the need for sufficient car parking supply available that is of the right quality, type and price to support redevelopment and regeneration objectives. *(Wolverhampton Parking Strategy, 2016).*

Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton
Free public parking for up to 2 hours for short-stay is provided in all Council owned car parks.	Car parking charges are set to discourage commuter parking.	The approach should not provide discounted charging regimes to fill empty spaces but should encourage public transport use. *(Walsall Town Centre Car Parking Strategy, 2017).*	Discourage long stay commuter car parking and support Park and Ride locations serving towns and cities. *(Wolverhampton Parking Strategy, 2016).*

3.2.8 A move away from long stay provision towards short stay parking is a key theme identified by Black Country Authorities, reflecting CEN8. There is a general focus on reducing the number of long stay users whilst ensuring that parking supply is attractive, convenient and safe to support growth and sustainability in the centres, aligning with CEN3.

3.2.9 It is also generally agreed that parking charges should be managed to prevent competition between centres, however, there are a number of examples of free or discounted parking offered as either a permanent arrangement in certain locations or on a part-time basis for events and public holidays such as the Christmas period.

3.2.10 There would also appear to be inconsistencies across centres with regards to the requirements for blue badge bays and provision for people with limited mobility.

TRAN5: Influencing The Demand For Travel And Travel Choices

3.2.11 **Table 3-4** reviews *TRAN5: Influencing the Demand for Travel and Travel Choices* and compares this with pertinent information on current local conditions gathered from policy and strategy documents including any supporting evidence available.

Table 3-4: TRAN5: Influencing The Demand For Travel And Travel Choices Compared to Current Local Approach

TRAN5: Influencing the Demand for Travel and Travel Choices

- *Pricing not to be used to create competition.*
- *Type of parking - Short-stay to support retail and leisure in centres and long stay removed to encourage commuters onto more sustainable modes and reduce peak-hour traffic.*
- *Consistent maximum parking standards for new development.*
- *Parking locations to be reviewed in line with Network Management Duty for efficient traffic flow.*
- *Strategic Park and Ride on key public transport routes to support network management.*
- *Smarter Choices promotion and implementation to reduce the need to travel and to encourage sustainable travel.*

Current Approach (including management practice, where data is available)

Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton
A large amount of public short stay provision, with 10 short stay car parks (997 bays). *(Dudley MBC data).*	Low public short stay provision with only 4 short stay car parks (103 bays). *(Sandwell MBC data).*	Reasonable amount of public short stay parking provision with 9 short stay car parks (611 bays). *(Walsall MBC data).*	A large amount of public short stay provision with 14 short stay car parks (1,236 bays). *(City of Wolverhampton data).*

Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton
Poor electric vehicle provision (6 bays), Dudley electric vehicle ownership is 0.23% (2020). *(Black Country ULEV Strategy, 2020).*	No electric vehicle provision in publicly operated car parks. Sandwell electric vehicle ownership is 0.20% (2020). *(Black Country ULEV Strategy, 2020).*	No electric vehicle provision in Walsall centres. Walsall electric vehicle ownership is 0.19% (2020). *(Black Country ULEV Strategy, 2020).*	Poor electric vehicle charging facilities within city centre public car parks (3 bays), additional 6 installed in 2019 and more planned – see para 3.2.14 below. Wolverhampton electric vehicle ownership is 0.17% (2020). *(Black Country ULEV Strategy, 2020).*
The Council adopted revised Parking Standards SPD in Sept 2017 - to ensure that parking provision in new developments meets expected demand whilst making the most efficient use of land, maintaining the principles of sustainable development and good design.	Documents still refer to superseded PPG13 maximum parking standards for proposed new development.	Documents still refer to superseded PPG13 maximum parking standards for proposed new development.	Car Park Strategy refers to no net loss of car parking as a result of new development in Wolverhampton City Centre. (*Wolverhampton Parking Strategy, 2016).*
Data on off-street parking use has not been collected in recent years to inform level of provision needed. It is acknowledged that car parking provision can have a role in regulating traffic flow, assisting traffic management, and encouraging footfall into the key centres, and encouraging sustainable transport use can support regeneration. There is a desire to expand Park & Ride in Sandwell and Dudley. *(WM Park & Ride Strategy Phase 1 – 2018 Draft).*	There is a desire to expand Park & Ride at Sandwell. *(WM Park & Ride Strategy Phase 1 – 2018 Draft).*	Redeveloping car parks, increasing short stay parking to support retail and leisure whilst reducing long stay parking to encourage the use of sustainable travel. *(Walsall Town Centre Car Parking Strategy, 2017).*	Encourage walking, cycling and public transport use and to increase their mode share in line with the West Midlands Transport Strategy. *(Wolverhampton Parking Strategy, 2016).*

3.2.12 Introduced in 2012 as part of the Mobility as a Service (MaaS) programme, the Swift flexible travel card for bus, train and tram is widely available for use in the West Midlands including across the Black Country. This service has not been reviewed as part of the parking study but aligns with aspects of TRAN5.

3.2.13 The primary objective of transport strategy across the Black Country is to encourage modal shift to carbon neutral modes, such as walking and cycling, through infrastructure provision rather than through car parking policy. However, parking policy is also vital in supporting climate declarations and strategies through its contributions to mode shift and provision of facilities for electric vehicles, for example.

3.2.14 The shortage of EV chargepoints has been acknowledged as an issue and options are being explored. A comprehensive dataset is being compiled covering all car parks across the region to create a data-driven plan for delivery. It is anticipated that EV installations in public car parks should begin in the 2023/24 financial year, following the completion of the On-Street Residential Chargepoints Scheme (ORCS).

Overall Current Key Issues And Opportunities

3.2.15 Current key issues and opportunities as identified within the Stage 1 report, including additional observations on local approach in comparison with the BCCS policy provisions are outlined in **Figure 3-1**.

Figure 3-1: Current Issues Identified at Stage 1

Current Issues Identified At Stage 1

Strategy

- Most of the Tier 2 parking strategies at district level are now outdated.
- Inconsistent mix of short / long stay parking across the four authority areas and different management approaches.
- Major impact on parking requirements in centres arising from the changes in shopping trends and behaviours over time.

Parking Management

- Significant variation in parking capacity within the Strategic Centres.
- Car park pricing and management regime varies between centres.
- Data that is available suggests some car parks are popular and over-utilised but that there are a large number of under-utilised car parks elsewhere.
- Most of the existing car parking capacity serving centres is privately owned and there are limited opportunities to influence the operation and management of these.

Parking Facilities

- Blue badge parking standards and provision vary across the Black Country.
- There is a lack of coach and freight parking to serve the centres and a lack of data on current provision, usage, demand or desired locations.
- Many of the car parks offer poor quality pedestrian links with the centres they serve.

Placemaking, Regeneration And Achieving Net Zero Carbon

- There is sparse provision of EV charging points.
- There is a need for car parks to adapt and accommodate new demands such as EV, Shared Mobility, and, in time, increased automation (including CAV).
- There are significant budgetary pressures on Councils to manage their car parks, particularly post-Covid19 as incomes fell dramatically.

Data Quailty

- Significant lack of up-to-date car park data on capacity, management practices, occupancy, facilities and usage trends.

3.2.16 The opportunities identified as a result are summarised in **Figure 3-2.**

Figure 3-2: Potential Parking Strategy Opportunities for The Black Country

Parking Strategy Opportunities Identified At Stage 1

Strategy

- Update and align parking strategies across the four authority areas.
- Improve car park data collection and consistency across publicly owned car parks and seek to secure data for privately operated sites.
- Introduce consistent or complementary pricing and management regimes.
- Consider coach and freight parking opportunities in or near centres, informed by wider strategy and evidence (see paras 3.2.17-19 below).
- Apply consistent (reconsidering the need for maximum) parking standards when considering applications for new development.

Placemaking, Regeneration And Achieving Net Zero Carbon

- Audit and improve the quality of the parking provision.
- Redesign/optimise car parks to meet evolving needs - consider scale and form of car parks.
- Encourage car free developments.
- Increase EV charging provision.
- Apply consistent criteria for long/short stay provision.

Inclusive Growth

- Consistent approach to provision and management of blue badge parking bays.
- Consider provision of Mobility Hubs/'15 Minute Neighbourhoods' to encourage modal shift – access to public transport, shared mobility options and improved access to trip attractors and neighbouring centres etc.

Land Use And Development

- Release under-utilised surface car parks for new development.
- Review current parking to better support the centres strategy and regeneration aspirations.
- Consider the net parking requirements for new town centre development.

3.2.17 The West Midlands Freight Strategy (2016)[1] highlights the importance of safe and secure HGV parking, especially overnight, as a tool to support economic growth and to help tackle road fuel consumption. This is supported by NPPF and relevant PPG, providing up-to-date and relevant advice on what is required in plan-making and considering development proposals with regards parking for large vehicles.

3.2.18 Coach and freight parking was not a focus for this study, which focuses on car parking strategy within centres, but it should be considered complementary to wider transport strategy. HGV parking in particular is most likely to come forward at strategic sites off the motorway and trunk road network, and therefore unlikely to affect centres in the Black Country. The Freight Strategy does, however, highlight that there is also a need to address localised HGV parking issues to support deliveries to and from centres, industrial areas and business parks etc.

[1] Source: https://www.tfwm.org.uk/who-we-are/our-strategy/freight-in-the-west-midlands/

3.2.19 It is noted that the West Midlands Lorry Parking Study 2005 which informed the Freight Strategy identified East and South Wolverhampton, North and South Dudley, Halesowen, Sandwell and Walsall as broad locations best suited to meet demand for local HGV parking. On this basis, it may be an appropriate topic for a Tier 2 study at Metropolitan level.

2021 Draft Black Country Plan

3.2.20 Further analysis has been undertaken to compare the most relevant policies *CEN2 Tier One: Strategic Centres, TRAN6: Influencing the Demand for Travel* and *Travel Choices, and TRAN7 Parking Management* as set out within the 2021 Draft Black Country Plan with information gathered on current local conditions. It is acknowledged that there are also other draft policies which relate in some way to parking matters such as TRAN9 '*Planning for Low Emission Vehicles.'*

CEN2: Strategic Centres

3.2.21 **Table 3-5** provides a summary of CEN2 provision as stated within the Draft BCP, against the current parking situation in each authority area, with pertinent information on current local conditions gathered from policy and strategy documents including any supporting evidence available.

Table 3-5: CEN2: Strategic Centres Compared to Current Local Approach

CEN2 Tier One: Strategic Centres

- *Protect and enhance retail in centres.*
- *Priority to support housing and employment growth aspirations and diversify centres with a well-balanced use mix.*
- *Maximise residential provision and provide complementary community uses.*
- *Enhance the leisure and evening economy.*
- *Development focused in Strategic Centres to serve wide catchment and encourage linked trips and sustainable transport use.*
- *Edge of centre and out of centre developments must meet relevant requirements.*
- *Enable access to Strategic Centres by a variety of modes, particularly walking, cycling and public transport.*

Current Approach (including management practice, where data is available)			
Dudley MBC	**Sandwell MBC**	**Walsall MBC**	**City of Wolverhampton**
Dudley has the most residential development planned. Potential Housing Growth Areas area identified within the AAP area, subject to consultation, including vacant, brownfield sites that are potentially suitable for new development. (*Draft Brierley Hill Area Action Plan, 2019*).	West Bromwich strategic centre identified to accommodate an estimated additional housing capacity of 500-1,000 homes. The currently committed housing and employment developments are located outside the centres. *(Sandwell MBC).*	Walsall Town Centre is only identified for a low proportion of the proposed development and no future employment allocated. *(Walsall MBC and Walsall Site Allocations Documents and the Walsall Town Centre AAP adopted in 2019).*	Car parking is set to be maintained at a level to support regeneration. Local planning policy seeks to encourage mode shift, charging is linked to viability. Consider overnight parking to support night-time leisure offer in the centre. *(Wolverhampton Parking Strategy, 2016).*

Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton
		Future carry-forward housing and employment developments are directed towards Walsall town centre, Bloxwich and Willenhall. Policy is to provide sufficient additional parking in the town centre to remain competitive for office, retail and leisure investment. *(Walsall MBC).*	Aim of the Strategy is to redevelop surface car parks identified in the AAP and Masterplans to enhance the city's economy, support employment growth, attract investment in new retail and leisure and housing (and introduction of multi-storey where appropriate). *Wolverhampton City Centre Area Action Plan (2016)* supports residential provision in the city centre, including empahsising use of upper floors and additional potential capacity on mixed-use sites (Policy CC7). This has meant that new residential-led schemes are coming forward such as in the Canalside Quarter and former Royal Hospital site.
Occupancy data indicates significant commuter parking and less parking available for those accessing the local retail offer. *(Dudley MBC).*	*West Bromwich Town Centre Car Parking Strategy (2003)* focuses on short stay parking to support the retail and commercial activity and ensure public access – constraints on long-stay parking.	Strategy is to redevelop car parks, increase short stay parking used for retail and leisure whilst reducing long stay parking to encourage the use of sustainable travel instead. *(Walsall Town Centre Car Parking Strategy 2017).*	Aim is to encourage walking, cycling and public transport use and increase their mode share in line with the West Midlands Transport Strategy. *(Wolverhampton Parking Strategy 2016).*

3.2.22 Current strategy and practices at a local level strongly support the provisions proposed in CEN2, particularly those around enabling a well-balanced use mix within centres and heavy promotion of sustainable modes.

3.2.23 There is a lack of data on night-time provision and demand for car parking to support the leisure and night-time economy. Detailed data and analysis on linked trips is not available, although analysis of the 2009 and 2019 Household Surveys provides some useful insight on travel and behavioural patterns as provided in **Section 3.3**.

TRAN6: Influencing The Demand For Travel And Travel Choices

3.2.24 **Table 3-6** examines TRAN6 as proposed within the Draft BCP against current parking strategy and practices across the Black Country.

Table 3-6: TRAN6: Influencing The Demand For Travel And Travel Choices Compared to Current Local Approach

TRAN6: Influencing the Demand for Travel and Travel Choices

- *Confirming a commitment to traffic management considerations in line with the Traffic Management Act 2004.*
- *Identify appropriate strategic and local Park and Ride sites on public transport routes to ease congestion into the centres.*
- *Manage region-wide traffic flows through the West Midlands UTC and joint working.*
- *Promoting and implementing Smarter Choices and a shift to sustainable modes.*

Current Approach (including management practice, where data is available)

Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton
Dudley MBC is responsible for the civil enforcement of on-street and off-street parking areas. A key objective of these powers is to maintain traffic flow. It is acknowledged that car parking provision plays a major role in regulating traffic flow and traffic management, as well as assisting in to encouraging footfall into the key centres. *(Dudley Parking Strategic Review).* Reference is made to the desire to expand Park & Ride at Sandwell and Dudley Railway Station. *(WM Park & Ride Strategy Phase 1 – 2018 Draft).*	Sandwell MBC is responsible for the civil enforcement of on-street and off-street parking areas. A key objective of this is to maintain traffic flow. *(Sandwell Parking and Traffic Enforcement Policy, 2017).* Reference is made to the desire to expand Park & Ride at Sandwell and Dudley Railway Station. *(WM Park & Ride Strategy Phase 1 – 2018 Draft).*	Walsall MBC is responsible for the civil enforcement of on-street and off-street parking areas. A key objective of these powers is to maintain traffic flow. Some sites are used to support football and particular events. A new Park & Ride facility is being developed to serve the A34 Sprint Bus Rapid Transit route.	The City of Wolverhampton is responsible for the civil enforcement of on-street and off-street parking areas. They can also enforce moving traffic offences in bus lanes to maintain traffic flow. The aim is to discourage long stay commuter car parking and support Park and Ride locations serving other towns and cities. Car parking is to be maintained at a level to support regeneration. Charging is linked to viability. The aim is to minimise the movement of cars seeking to access car parks within the city centre. (*Wolverhampton Parking Strategy, 2016).* There are a number of Park & Ride sites in Wolverhampton serving the Metro route. Other locations have been used to support Christmas trade and football events.

Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton
Encouraging the use of sustainable forms of transport can significantly contribute towards delivering regeneration to an area. *(Dudley Parking Strategic Review).*	Sandwell has a number of policies and guidance in place to promote sustainable travel, including a published Supplementary Planning Guidance Note 2006.	At a local level schemes aim to make local journeys safer, as well as more sustainable and active. *(Walsall Sustainable Modes of Travel Strategy, 2017-2022).*	Local strategy seeks to encourage mode shift. The aim is to encourage walking, cycling and public transport use and increase their mode share in line with the West Midlands Transport Strategy.

3.2.25 Many of the strategic aims set out in TRAN6 are similar to those put forward in the BCCS but there is greater emphasis in the Draft Plan on improving accessibility and effective management of traffic flows. Modal shift, as highlighted in the Draft Plan, would directly reduce car travel and improve traffic flow in the region. Current Park and Ride data was not analysed as part of this study, although there is some indication of the benefits this could bring in terms of wider transport strategy.

TRAN7: Parking Management

3.2.26 **Table 3-7** reviews TRAN7 within the Draft BCP against the current parking situation as defined within the Stage 1 report. Parking data has also been updated by the local authorities since Stage 1. The latest information is provided below.

Table 3-7: TRAN7: Parking Management Compared to Current Local Approach

TRAN7: Parking Management *Sustainable delivery and management of parking in centres by:* • *Ensuring parking management is not used as a competitive tool.* • *Remove long-stay in centres where appropriate to encourage leisure and retail and encourage commuters onto more sustainable transport.* • *Ensure there is a consistent approach to maximum parking standards in new developments.* • *Parking location to support Network Management Duty and efficient flow of traffic around centres.*			
Current Approach (including management practice, where data is available)			
Dudley MBC	**Sandwell MBC**	**Walsall MBC**	**City of Wolverhampton**
Public Car Parks – long stay at Level Street, Cottage Street, Little Cottage Street and Bank Street: 2hrs free, 3hrs £2.10, over 3hrs £3.50, overnight - £1.10, ASDA (Brierley Hill) – 2hrs free for customers only.	New Square and Astle Park is (80p/hour- the standard for West Brom). It is noted that astle does not offer refunds. Spend £5 in Tesco & get a 2 hour (£1.60) parking voucher.	There is only a charge for parking in Walsall town centre, while all district (Tier 2) centre Council car parks offer free parking. Public car park prices vary - most common for 15 car parks found below: 2 Hours £1.20, 4 Hours £2.20.	Public car parks Up to 1 hour = 50p to £1.50 (dependent on location), Up to 2 hours = £1.20 to £2.00, Up to 3 hours = £2.50 to £3.00, Up to 4 hours = £4.00 to £4.50 Up to 5 hours = £5.50, Over 5 hours = £8.00, Overnight = £1.00

Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton
Pearson Street (Napier Parking) – 1hr 50p, 2hrs 80p, 3 hrs £1.20, 6hrs £2, 24hrs £2.20, 2 days £4.40, week £9 The Moor Centre (Euro Parking), Bell Street – 2hrs free, 3hrs £1.50, 4hrs £2, 5hrs £2.50, 12 hrs £3.50 Waterfront East (alongside Dudley Canal) – car parking restrictions (details not known). Merry Hill Centre (1) free car parking across most of the Merry Hill Centre and Waterfront surface car parks. Some restricted to residents only at basement level at the multi-storey car park accessed off Times Square Avenue. A 4 hour limited stay (ANPR) introduced in 2019 to 2 (red and blue) car parks off Times Square Avenue. Staff parking only off Central Way (East), and also on middle storey of multi-storey car park off Central Way (North).	There is also: The Farley Centre car park: this is 60p per hour (for charity). A car park operated by the Gudwara Temple, in George Street, but this is now for Temple users only.	14 car parks offer free parking oustide at selected times. 11 car parks offer free parking during holiday periods. 10 car parks offer a max charge of £2.50 In July 2019, there was a temporary 6 month 20% reduction in parking charges, the 20% reduction continues to this date. During COVID-19 all parking charges for approximately 15 months were suspended, Parking supply within Walsall town centre far outstrips demand, particularly so following COVID-19. The Council is a minority provider of parking in Walsall town centre (~20%). Many private parking operators have shown no interest in providing free or reduced charge schemes.	City of Wolverhampton Council offered the following free parking for Christmas 2021 after 3pm, Monday to Friday only, started 1st December and finished on 24th December inclusive. The offer applied to the following four car parks only: School Street Car Park (c194 spaces) Peel Street Car Park (c183 spaces) Market Car Park (c69 spaces) Fold Street Car Park (c278 spaces) There was no pay and display ticket or RingGo session required, motorists were just permitted to park after 3pm. Anyone who parked before 3pm was only required to purchase enough parking to cover them until 3pm.
* 17 public long-stay car parks (1,574 bays, 10 short stay car parks (977 bays). *(Dudley MBC)* 6 private long-stay car parks (1,846 bays) compared to 4 short stays (3730 bays).	*19 public long-stay car parks (1,354 bays), 4 short-stay (103 bays). *Limited data for private car parks.*	*24 public long-stay car parks (1,280 bays), 9 short-stay (611 bays). *Limited data for private car parks.*	*16 public long-stay car parks (2,084 bays), 14 short-stay (1,236 bays). *(City of Wolverhampton Council).* 8 private long stay car parks, (1766 bays), 11 short stay car parks, (3,686 bays).

** All bays relate to standard bays and should be used as an approximate as the data received during Stage 1 was not validated.*

3.2.27 It is noted that car park pricing varies across all areas and there is little control that can be asserted over the pricing of privately managed car parks (other than where they are subject of specific planning conditions). Greater parity across the centres would be required to support the policy provision and ensure parking management is not used as a tool for competition. It is also evident that there is a disparity between the Strategic Centres in terms of the quantum of long stay and short stay parking. These elements could perhaps be addressed through a statement of commitment.

3.2.28 The above analysis of parking policy and practices with consideration of the provisions of the Draft BCP highlights the following:

i. That parking policy, provision and management should place even greater emphasis on supporting wider Plan objectives to increase sustainable travel and achieve mode shift to public transport and active modes.

ii. Parking policies and practices need to proactively consider future mobility trends and better cater for electric vehicle charging, shared ownership, micromobility, and increased automation of vehicles and parking management.

iii. The overall control of parking is largely limited to those car parks in public ownership and car parking for new developments where specific conditions can be imposed to encourage more sustainable travel, shared use, complementary parking charge regimes, and discourage long-stay provision.

iv. It is clear that some car parks in the Black Country are not well used, suggesting over-provision. A consistent approach to repurposing under-utilised car park sites for the development of housing, employment, leisure and community facilities in the Strategic Centres would be beneficial. The current City of Wolverhampton approach is to ensure that there is no net loss of car parking as a result of the redevelopment of some of the surface car parks.

v. There is a need for consistent and comprehensive car park data collection and analysis across all four districts to inform Tier 1 and 2 policy and strategy, and to monitor and evaluate performance against the Plan. This would also allow a more evidence-led understanding of the impact of the loss of any under-utilised car park sites to redevelopment and the positive impact achieved from public transport and active travel investment in the area.

Comparison of the Black Country Centres Study with the Draft Black Country Plan

3.2.29 A review of the Black Country Centres Study against the Draft Black Country Plan has been undertaken to understand the alignment between study findings and proposed policies CEN2: Tier One: Strategic Centres, TRAN6: Influencing the Demand for Travel and Travel Choices and TRAN7: Parking Management.

3.2.30 An overview is included in **Figure 3-3, Figure 3-4 and Figure 3-5**. The left-hand column includes a summary of Draft Plan provisions under each proposed policy and the right-hand column refers to relevant Centres Study findings in each case.

3.2.31 It should be noted that the Centres Study was commissioned to inform the Draft BCP centres policies specifically and not to address general issues such as modal shift, parking or to inform broader TRAN 6 and 7 policies.

Figure 3-3: Comparison of the Centres Study findings with CEN2 provisions of the Draft BCP

Protect and enhance retail in centres

- Clear 'digital revolution' and growth of online retailing.
- Competition for shoppers and expenditure so need to attract the interest and attention of potential consumers across all age and socio-economic groupings.
- COVID-19 pandemic has had a significant impact and seen a reduction on spending and retail sales in 2020.
- Out-of-centre shopping have a competitive advantage, with the supply of larger format modern outlets, cheaper occupancy costs, free parking and convenient access to the road networks.
- Rising occupancy costs and increasing competition from online and out-of-centre shopping.
- Towns and shopping centres have too much retail space.
- Retail sector need new digital strategies and multi channels to interact with customers.
- Increase open spaces and pursuits in centres.
- Long-term town centre vacancies mean feelings of neglect and lack of investment that push more people to shop online.
- Potential to provide new residential development in and on the edge of centres to maintain and strengthen overall vitality and viability.

Support housing and employment growth aspirations – diversify centres. Maximise residential provision and community uses

- Capacity of Strategic Centres in particular to contribute to residential provision should be investigated further.
- Increase in city living and residential development in town centres is likely to be a growth area in the next 10 years and could be a positive regenerative mandate.

Enhance the leisure evening economy

- West Bromwich leisure sector has increased since 2015 and has maintained a level of around 15% but this is significantly below the national average at around 25%. The centre also lacks a significant evening economy.
- Following a dramatic -53.8% fall in leisure spend per head in 2020, Experian forecast a return to growth in 2021 (+64.7%) and 2022 (+14.8%)
- Forecast growth available to sustain new cafés, restaurants and bars, but very much subject to market demand.

Encourage linked trips

- Study emphasis on focussing development particularly in centres and enhancing the viability of centres will encourage linked trips.

Improve sustainability and accessibility

- Need to invest in the quality of town centre environments - including streetscapes, buildings, more outdoor space for pedestrians to create more attractive, accessible, safe and greener, carbon neutral environments.
- Introducing more planting of trees and parks into centres, where space allows.

Encourage modal shift

- Study emphasis on focussing development particularly in centres and enhancing the viability of centres will encourage modal shift.

Accessibility: Strategic Centres by a variety of modes, particularly walking, cycling and public transport.

- Potential consumers across all age and socio-economic groupings all parking including disabled bays, access to public transport and more specialist services.
- Increase in demand for more flexible workspace particularly focussed on transport hubs.
- A need to facilitate better pedestrian flows and improve the environmental quality of the centres.
- Provide enhanced pedestrian and cycle faciltiies, especially integrating with the Midland Metro Network.
- Opportunities to increase cycle ridership and maximise storage.

Figure 3-4: Comparison of the Centres Study findings with TRAN6 provisions of the Draft BCP

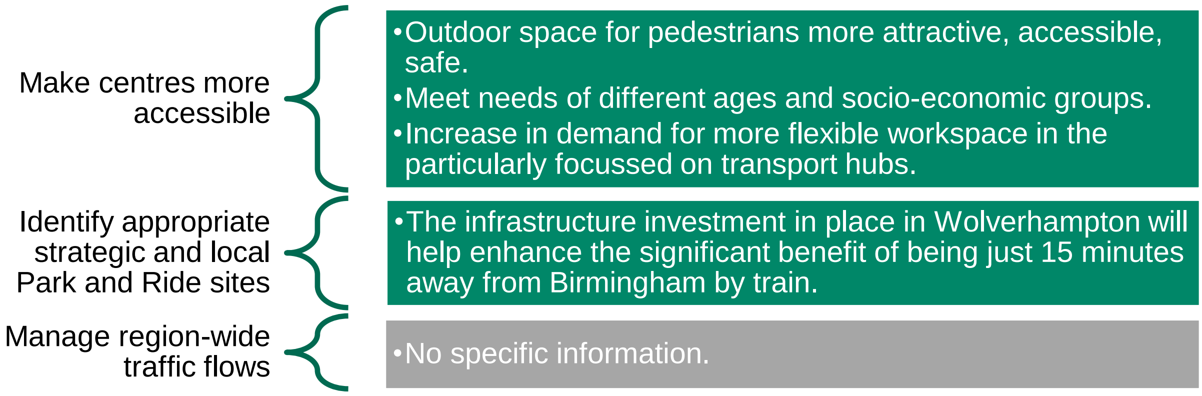
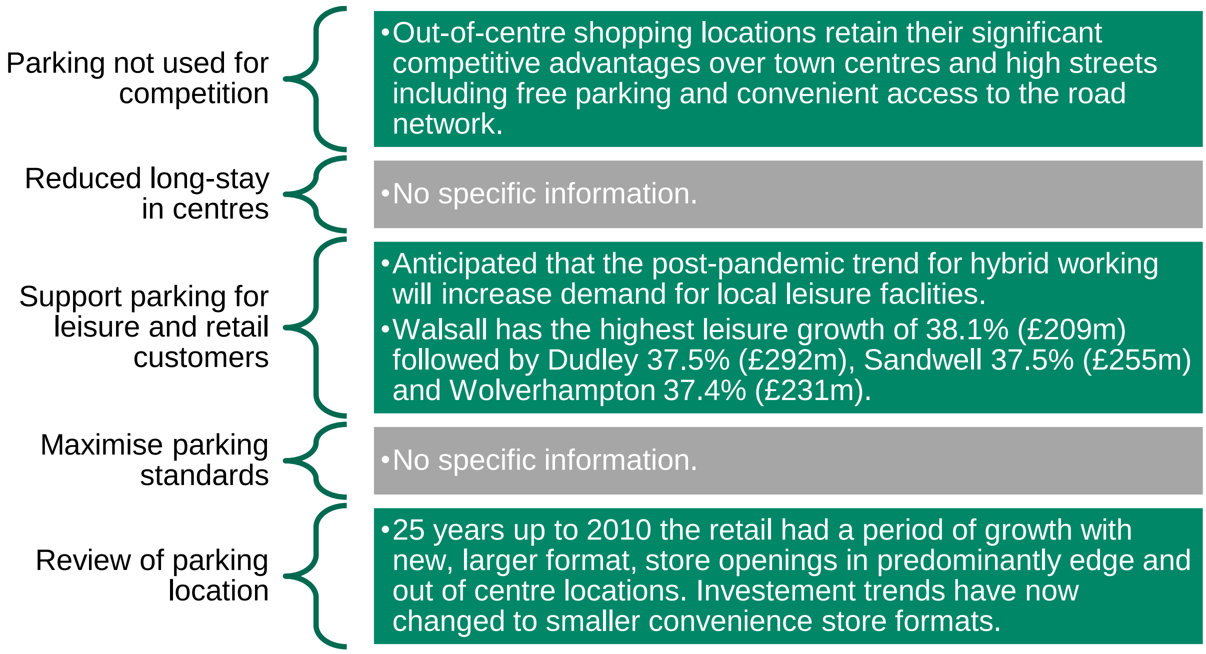


Figure 3-5: Comparison of the Centres Study findings with TRAN7 provisions of the Draft BCP



3.3 Task 2b – Analysis of 2009 and 2019 Household Surveys

3.3.1 Task 2 set out to undertake a comparative analysis of raw data from 2009 and 2019 Household Surveys, questions relating to car parking and mode of travel in particular, to understand if there was any evidence that could enhance understanding of demand for parking across the Strategic Centres and if there is any indication of a shift in modes or attitudes over the intervening period.

3.3.2 The original purpose of the surveys was to inform the Black Country Centres Study, enabling an assessment of shopping patterns and consideration of the future need for retail, office and commercial leisure development within the centres. The questions on transport were not specifically designed to aid understanding of demand for car parking or propensity for mode shift, although the results offer some useful insight.

3.3.3 The scope of the 2009 and the 2019 household surveys differs and this introduced a number of variables including different questions and, in 2019, a larger geographical area was surveyed, resulting in a 50% increase in households responding. This made it difficult to compare the results on a like for like basis.

3.3.4 In light of these data limitations the scope of this task was amended to offer separate analysis of car parking and mode share data taken from the 2009 and 2019 surveys. Where there are synergies across the relevant questions in the two data sets, a comparison has been undertaken. Three separate reports have been produced, as follows:

- 2009 Household Survey Analysis **(Appendix A)**
- 2019 Household Survey Analysis **(Appendix B)**
- 2009 and 2019 Household Surveys Comparison, including consideration of the data limitations **(Appendix C)**

3.3.5 A summary is provided below.

2009 Household Surveys

3.3.6 The 2009 survey interviewed 4,500 households over 54 postal code zones in and around the Black Country. 18 questions have been analysed out of 28 questions in total. All data limitations and a full analysis can be found in **Appendix A**. Set out below is a summary of the main findings.

3.3.7 **Location of the main food shop** - Between 46% and 51% of participants from Dudley, Sandwell and Walsall conducted their main food shopping within their local authority area. A greater percentage (77%) of Wolverhampton participants and participants from outside the Black Country did their main food shop within their local area.

3.3.8 **Mode of travel** - In all areas it was found that the principal mode of travel used for the main food shopping activity was by car as a passenger or driver, at around 80%. Sandwell had the lowest percentage at 70%. Bus use was the second most popular mode, with Sandwell having the highest bus use at 15% and Dudley the lowest at 7%. Walking was the third choice with 11% walking in Sandwell and the lowest at 7% in both Dudley and Wolverhampton. There were no clear links able to be made between the location of the store and the mode used. A similar trend was also found for clothes and footwear shopping but there was an increase in bus use within Sandwell (33%) for the purposes of clothing compared to food shopping (15%).

3.3.9 **Linked trips** - Analysis shows that about 35% respondents combined their main food shop with other trips, such as meeting friends and family, getting petrol etc. This was consistent across the Black Country.

3.3.10 **Clothes shopping location** - The locations of the town centre, freestanding stores and retail parks used for clothes shopping were analysed. This showed that, compared to all other areas, the majority of Wolverhampton participants did their clothes shopping in Wolverhampton. This pattern was not replicated for the other Black Country respondents who often travelled further afield.

3.3.11 **Town centre ‘likes’, ‘dislikes’ and ‘improvements’** - Participants were asked what they most liked and disliked about their local centre, freestanding store or retail park for clothes shopping. The top three transport-related categories were, ‘good and/or free car park’, ‘good bus service/accessible public transport’ and ‘easily accessible by foot/cycle’.

3.3.12 The top three dislikes were that it was ‘difficult to park near shops’, ‘traffic congestion’ and ‘difficult to park’. Cost of parking and poor bus service were listed but did not score high on average. In relation to the top three improvements desired, these were ‘cheaper parking’, ‘easier/more parking’ and ‘better public transport links’.

3.3.13 **Factors that would encourage a longer stay** - Participants suggested that better accessibility by bus, especially in Walsall, Sandwell and Dudley would encourage them to stay in their local centre longer. In Wolverhampton more late night car parking provision was also suggested.

3.3.14 **Participant characteristics** - In all areas the majority of participants were identified as female at an average of 72%. Most of the participants that took part in the survey were aged 35 or above. The ability to assess trends in younger people is therefore more limited. There is a wide distribution of socio-economic groups surveyed and most participants were working full time or retired, which aligns with the age profile of the participants. In relation to household income, the majority of people were in the £0-£14,999 bracket, but this did range between 15% and 25% across the local authorities. However, almost half of the participants in this survey either did not know or refused to answer. In terms of participant ethnic background, the majority of participants were from a White (British/Irish/Other) background ranging from 89% to 96% across all local authorities, which is not representative of the ethnicity of the population of the Black Country as a whole.

2019 Household Surveys

3.3.15 The 2019 survey interviewed 6,000 households over 55 postal code zones in and around the Black Country. All data limitations and a full analysis can be found in **Appendix B**. Set out below is a summary of the main findings.

3.3.16 **Location of the main food shop** - Responses on travel to the main food shopping destination showed that in all areas in 2019 participants chose to shop within the same local authority area they lived in. A significant proportion of participants also said they completed their food shopping online.

3.3.17 **Mode of travel** - In relation to the mode of travel used to complete the main food shop, data shows that there was a significant amount of car use across all local authority areas. The lowest car use was indicated by respondents in Sandwell at 73% and the highest in Dudley at 84%. Sandwell had the highest bus usage at 9% with Dudley having the lowest at 5%. Sandwell also had the highest walking rate for food shopping at 13% with Wolverhampton having the lowest walking levels at 8%.

3.3.18 **Linked trips** - In relation to linked trips, respondents from all the areas reported similarly high levels ranging from 59% to 63%. This means that participants not only completed their food shop but regularly combined the trip with other elements such as getting petrol, going to other food shopping destinations, or meeting friends and family.

3.3.19 **Town centre ‘likes’, ‘dislikes’ and ‘improvements’** - The top three likes about the centre located closest to the participants were ‘easy to get to by car,’ ‘easy to get to by bus’ and ‘easy to park’. Other responses made by fewer than 5% of respondents included ‘easy to get to by bike’, ‘easy to get to by public transport’, and ‘easy to get to by train’, ‘free parking’, ‘good disabled access’ and ‘pedestrianised.’ A question was asked in relation to suggested improvements to the closest town or city centre, with an average of 35% in all areas highlighting that free parking and more/better parking was important to them. Better access by road and better public transport were also mentioned by an average of 9%.

3.3.20 **Reason not to visit a centre** - The main reason for not wanting to visit a local centre highlighted by respondents from all areas was poor parking provision. Walsall participants highlighted that their nearest centre was not easy to get to by car. People that said they were not using the nearest centre for household shopping cited a range of factors including poor parking provision, traffic congestion, that it was not easy to get too by bike, car and bus and the cost of parking.

3.3.21 **Clothes shopping location and mode of travel** - There is variation of clothes shopping location across the Black Country with 63% of Dudley participants shopping within the district (area includes Merry Hill) whereas in other areas the proportion ranges from 20% to 33%. The levels of internet/delivery shopping ranges from 17% to 28%. The mode used to travel for clothes shopping is predominantly by car as a driver or passenger. Wolverhampton has the highest car use at 80%, as other areas ranges from 65% to 71%. The second most common mode is by bus with Walsall and Sandwell having the highest use of bus at 21% each and Dudley has the lowest at 13%. In terms of walking, all areas have similar levels of between 3% to 5%.

3.3.22 **Participant characteristics** - The majority of people surveyed were female with a range from 62% to 68% for all areas. Most of the participants that took part were aged 65+ across all areas but with a general age span of participants between 25 and 65+. There were no significant geographical differences in the age range of the participants. In relation to the chief wage earner, an average of 44% of all participants were working full time and 20% were self-employed. No questions were asked in relation to ethnicity and income etc.

2009 and 2019 Comparison

3.3.23 The 2009 and 2019 survey comparison report can be found in **Appendix C**. Only seven relevant questions could be reasonably compared between the 2009 and 2019 surveys as set out in **Table 3-8**; three primary questions about household main food shopping and four participant characteristics questions have been analysed and weighted. Due to the data limitations, the information should only be used as an indicator of trends.

Table 3-8: Comparison of Questions Asked in Household Surveys 2009 and 2019

2009 Question		2019 Question	
Q01	In which shop or shopping centre do you do most of your household's main food shopping? (Not including don't do or internet / delivered at Q01)	Q01	Where do you normally shop for all your household's main food and grocery shopping needs (i.e. primarily bulk trolley purchases)? Excl. Nulls & SFT
Q02	How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?	Q04	How do you normally travel to (LOCATION MENTIONED AT Q01)? Not those who do their main food shopping via the internet at Q01
Q03	When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example non-food shopping, leisure / entertainment activities, restaurants, bars, banks, etc? Those who used a shop or shopping centre (not including internet / delivered) at Q01	Q05	When you visit (LOCATION MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)? [MR]Not those who do their main food shopping via the internet at Q01
GEN	Gender of respondent.	GEN	Gender of respondent.
AGE	Could I ask how old you are ?	AGE	Can I ask how old you are please?
EMP	Which of the following best describes the chief wage earner of your household's current employment situation ?	EMP	Which of the following best describes the chief wage earner of your household's current employment situation? [PR]
CAR	How many cars does your household own or have the use of ?	CAR	How many cars does your household own or have the use of?

3.3.24 In terms of main food shopping locations, the principal difference is that the 2019 survey includes data on internet shopping indicating that an average of 23% respondents across all areas completed their food shop online by 2019.

3.3.25 In relation to the mode of travel used, car use to the main food shop destination across all areas appears to have increased by approximately 2.4% since 2009. Travel by bus seems to have decreased overall by 6.6.% since 2009.

3.3.26 There is considered to be a significant difference in linked trip patterns. In 2009 residents of all local authorities reported an average of 41% linked trips and this increased to an average of 60% in 2019, an increase of 19%.

3.3.27 In relation to gender, more females were found to be participating in the survey in 2009 (an additional 6%) compared to 2019 but this is not considered to be significant. In 2019 the majority of participants were aged above 25 with 9% fewer participants aged 65+ than in 2009. It is also worthwhile noting that in 2009 the proportion of participants aged between 18 to 24 was 2% compared to 8% in 2019. Most participants were either in full-time work or retired in both years surveyed, but there was an increase of 3% reporting to be part-time workers in 2019. In terms of car ownership, the levels were similar, with a maximum 10% difference between 2009 and 2019.

Household Survey Conclusion

3.3.28 It should be acknowledged that the surveys were undertaken to inform the Black Country Centres Study and not intended to be used to confirm transport-related trends over time by comparison. It is also noted that the surveys only provide a snapshot from a sample of households a decade apart and do not offer a consistent, time-series evidence base.

3.3.29 Nevertheless, the data indicates that there has been an increase over time in online shopping, increased car ownership and travel by car for food shopping in particular but also that more people are now choosing to shop more locally and within their own local authority areas, making shorter journeys and more linked trips in the process.

3.4 Task 2c – Case Studies

3.4.1 The purpose of this task was to review available data for Merry Hill as a key destination within the Black Country and select other relevant case studies to compare parking provision and understand if public transport investment around such sites appears to have supported mode shift towards sustainable transport.

3.4.2 A long list of 13 retail centres across England was originally identified, including Merry Hill. These were filtered down to a shortlist of three to be used as appropriate case studies. This shortlisting was undertaken in collaboration with the client. **Table 3-9** lists the other ten sites identified and sets out the rationale for not including them as as a case study.

Table 3-9: Long List of Retail Centres – Non-Case Study Sites

Retail Centre	Reasons Not Selected as a Case Study
McArthur Glen Outlet - Cannock	Small site (26,477sqm) compared to the chosen three centres (e.g. Meadowhall – 130,000 sqm).
Cheshire Oaks Designer Outlet – Ellesmere Port	Small site (31,300 sqm) compared to the chosen three centres (e.g. Meadowhall – 130,000 sqm).
McArthur Glen Outlet - East Midlands (Mansfield)	Large distance between retail centre and the nearest large town (8 miles from Mansfield).

Touchwood Shopping Centre - Solihull	A limited number of car parking bays (1700 bays) compared to the chosen retail centres (e.g. Merry Hill – 9209 bays), with paid parking provision.
Arndale Centre - Manchester	A limited number of car parking bays (1470) as retail site is located within Manchester City Centre and is less comparable to Merry Hill in the Black Country.
Metrocentre - Gateshead	Located furthest away from the Black Country and is too large (192,900 sqm) to be compared to Merry Hill (155,200 sqm).
Trafford Centre - Manchester	Located furthest away from the Black Country and is too large (188,000sqm), with 18 car parks with 11,500 bays to be compared to Merry Hill (155,200 sqm).
Maybird Shopping Park - Stratford-upon-Avon	Small site (21,368 sqm), with only 869 parking bays compared to the chosen three centres (e.g. Meadowhall – 130,000 sqm).
Greenbridge Retail Park – Swindon	Small site (28,707sqm), with only 1,964 parking bays compared to the chosen three centres (e.g. Meadowhall – 130,000 sqm).
Kingfisher Shopping Centre – Redditch	A limited number of car parking bays (2400 bays) compared to the chosen retail centres (e.g. Merry Hill – 9209 bays), with paid parking provision.

3.4.3 The three retail centres selected as case studies are Merry Hill Shopping Centre – Brierley Hill, Telford Shopping Centre - Telford and Meadowhall Shopping Centre – Sheffield. These were considered to have similar characteristics in terms of scale, location, car park provision and local transport opportunities.

3.4.4 **Figure 3-6** outlines the key characteristics of each of the three retail centres investigated in further detail.

Figure 3-6: Selection of Case Studies

Merry Hill

9209 Car Park Bays

- The principal subject for policy focus and included for comparison.
- 9th largest shopping centre in UK by area (155,200m²).
- Provides retail, food, and leisure services and is therefore a significant attraction for people in the West Midlands.
- Easy access to free parking has been considered a key attractor when compared with other Black Country centres.

Telford

> 4000 Car Park Bays

- The retail centre is located within the town centre creating a different retail dynamic.
- Only retail centre researched where car parking payments are required.
- Car parking is separated into short stay (<3hrs) and long stay (>3hrs) parking.

Meadowhall

12,000 Car Park Bays

- Has the greatest number of car park bays compared to all sites researched.
- Closest retail site to a major city (15 mins to Sheffield).
- 12th largest retail centre in UK by area (130,000m²).
- UK's only major out-of-town shopping centre with its own train, tram and bus interchange.

3.4.5 **Figures 3-7 to 3.9** provide a summary of significant public transport and active travel investment around each retail centre, set against available mode share statistics for the area.

3.4.6 It is important to note that a causal link between transport investment and changes in mode share at the three centres could not be determined as there is limited data available in the public domain. Additionally, mode share data could not be obtained for the present year.

Case Study 1 - Merry Hill Shopping Centre

3.4.7 Merry Hill Shopping Centre is located in Brierley Hill, Dudley. The site is the 9th largest retail centre in the UK and provides car parking for around 9,200 vehicles. In recent years, there has been significant investment made in sustainable transport in the surrounding areas, with the most notable shown in **Figure 3-7** and further measures identified in **Table 4.1**. However, currently there is no available data to show that this investment has yet directly contributed to a modal shift in the area.

Figure 3-7: Summary of Transport Investment in Brierley Hill and Mode Share Data

Investment In Public Transport

- £24 million investment in Dudley Interchange to help create a mobility hub around Dudley and improve connectivity within the area through the use of rapid transit vehicles. (1)
- £450 million Wednesbury to Brierley Hill Metro Extension to help develop a more integrated and sustainable transport network, encouraging more trips to Brierley Hill town centre. (2)

Mode Share around Brierley Hill (2019) *TfWM Annual Cordon Counts

- In 2019, AM Peak trips by public transport represented a 9.8% share of all trips, compared to an 8.8% share in 2017.
- Bus trips and car trips increased by +14% and +0.9% respectively from 2017.
- Cycle trips saw small decreases of -4 trips, whereas heavy vehicle trips increased by +43.6%.
- One third of AM Peak bus trips were travelling to Merry Hill shopping centre.

Case Study 2 - Telford Shopping Centre

3.4.8 Telford Shopping Centre is located within Telford Town Centre. The site provides seven car parks, which provide a total of approximately 4,000 fee paying car park spaces. The parking fees are shown in **Table 3-10**. There is also an incentive to visit on Thursdays as there is free parking from 5pm.

Table 3-10: Telford Cost of Parking

Time	Cost
Up to 10 minutes	Free
Up to 30 minutes	50p
Up to 1 hour	£1.10
Up to 2 hours	£1.60
Up to 3 hours	£2.20
3 hours+ (Short Stay)	£6.00
3 hours+ (Long Stay)	£4.00

Source: https://www.telfordcentre.com/visit/parking/

3.4.9 Telford Town Centre is predominantly accessed by car and there are a large number of short and long stay parking spaces to serve the centre. In recent years Telford has invested significantly in active travel and public transport, as shown **Figure 3-8**.

Figure 3-8: Summary of Transport Investment in Telford and Mode Share Data

Investment in Public Transport / Active Travel	Mode Share in Telford
• Telford is concentrating on behaviour change / soft measures to encourage mode change, such as cycle training programmes. (1) • They are also planning cycling facilities for surrounding core centres, e.g. Southwater Bike Hub (which provides a cycle loan and maintenance). (1) • There are plans to encourage rail use by increasing car and cycle parking capacity at Telford Central Station and improving passenger waiting facilities. (2)	• Only 8% of trips to work were by foot in 2013/2014 which is below the regional and national average. (2) • According to the 2011 Census, only 2.1% of commuting trips were done by bicycle. (2) • For trips between 2 and 5 km, car use is > 82% whilst cycling represents only 3.3% and walking only a 4.3% share. (2)

Source: (1) Telford & Wrekin Council Cycling & Walking Strategy (2017)[2] (2) Telford & Wrekin Council Transport Growth Strategy (2016)[3]

3.4.10 The investment in active travel and public transport over the last decade seems to be reflected in an increase in walking and cycling mode share for commuter trips across Telford in 2013/14 of 10.2% when compared to 2011 Census data where work trips undertaken by walking and cycling were only around 2%. There is no more recent data available to understand the effects of investment made since the publication of Telford's latest transport-related strategies.

Case Study 3 - Meadowhall Shopping Centre

3.4.11 Meadowhall Shopping Centre is located in Sheffield within South Yorkshire. The site can be accessed by a variety of transport modes including bus, tram, train and car. Recently, the area has prioritised investment in sustainable travel and public transport, as displayed in **Figure 3.9**.

Figure 3-9: Summary of Transport Investment in Sheffield and Mode Share Data

Investment In Public Transport / Sustainable Travel
In 2020 £116,000 was invested to improve the car park at Meadowhall Interchange (better surfacing and CCTV). This promoted rail travel and park & ride to reach Meadowhall Shopping Centre. (1)
Meadowhall was the first UK shopping centre to install EV charging points in 2008. In 2014 it invested in South Yorkshire's first rapid charging points where customers can charge their vehicles to 80% in just 20 minutes. (2)

Mode Share In Sheffield (September 2020) (3)	
Car / Taxi	64.5%
Bus / Coach	10.3%
Van	9.2%
Walk	7.1%
Rail	3.7%
Tram	1.3%
Cycle	1.0%

Source: (1) Rail Business Daily (2020), £166,000 investment transforms Meadowhall Interchange car park[4] (2) Meadowhall Invests £1 million in Sustainable Solar Panels[5] (3) Cycle Sheffield, Mode share for 2020 (September snapshot)[6]

[2] https://www.telford.gov.uk/download/downloads/id/7995/cycling_and_walking_strategy.pdf
[3] https://www.telford.gov.uk/download/downloads/id/3873/transport_growth_strategy.pdf
[4] https://news.railbusinessdaily.com/166000-investment-transforms-meadowhall-interchange-car-park/
[5] https://www.meadowhall.co.uk/news/meadowhall-invests-%C2%A31-million-sustainable-solar-panels#:~:text=The%20shopping%20centre%20became%20the,of%20mains%20water%20last%20year.
[6] https://www.cyclesheffield.org.uk/sheffield-transport-data/

3.4.12 Meadowhall is currently the only shopping centre in the UK with its own tram, train and bus interchange. The investment in public transport and sustainable travel demonstrates that Meadowhall continues to prioritise sustainable access to its site. As a result, there is a greater modal shift away from the car to sustainable modes than found in other areas.

Application of Draft Black Country Policy to Case Study Sites

3.4.13 **Figure 3-10** considers how each of the three retail centres selected as a case study would likely be impacted by policies CEN3, TRAN6, and TRAN7 as set out in the 2021 Draft BCP and what sites would need to do to comply with the proposed policy provisions.

Figure 3-10: Actions Required to Comply with Policies CEN3, TRAN6, AND TRAN7

CEN2

To comply with the draft CEN2 policy, all three retail centres would need to:

- Focus on introducing more community facilities to their sites to promote diversification.
- Prioritise improving sustainable accessibility to the centre (public transport, active travel, EV charging points - particularly Telford and Merry Hill).
- Improve the public realm and pedestrian environment to make the site more conducive to cycling and walking.
- Improve levels of public transport and cycling and walking provision to access the sites.

TRAN6

To comply with the draft TRAN6 policy, all three retail centres would need to:

- Incentivise sustainable travel to facilitate the use of more sustainable modes.
- Reduce car park capacity and make additional provision for buses, walking and cycling.
- Provide more innovative mode choices, e.g. investing in micro-mobility devices like e-scooters to encourage mode shift (last mile provision).

TRAN7

To comply with the draft TRAN7 policy, all three retail centres would need to:

- Apply consistent car parking tariffs and management regimes to reduce competition between centres.
- Adopt consistent parking standard and practices.
- Reduce long stay parking provision and encourage short stay parking, perhaps through the use of pricing policies.
- Create Controlled Parking Zones to discourage on-street parking in the vicinity of the centre and encourage commuters to use more sustainable transport modes.

4 Task 3 – Policy Analysis and Advice

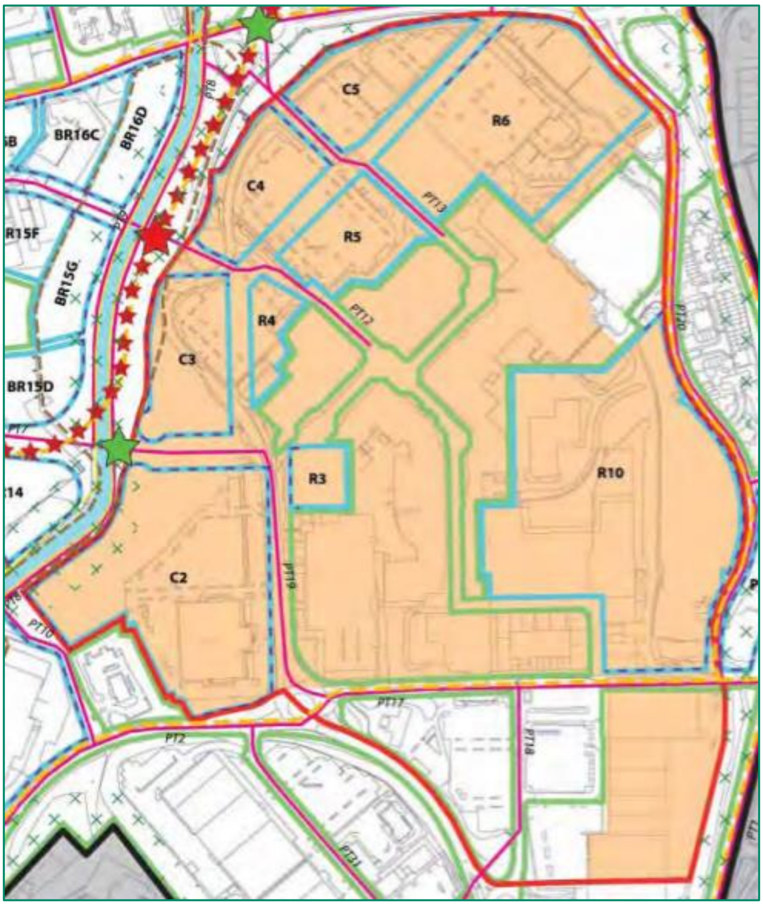
4.1.1 Set out below is a more in-depth analysis of Policy CEN3 included in the Black Country Core Strategy (BCCS), particularly pre-condition c, and a look at whether the evidence supports a different policy approach as set out in the emerging Black Country Plan (BCP) through Policy CEN2.

4.2 Black Country Core Strategy Policy CEN3

4.2.1 As discussed in **Section 2**, Policy *CEN3 - Growth in the Strategic Centres* includes a set of pre-conditions to control any new comparison retail development at Merry Hill specifically and help avoid competition between centres. Of note, pre-condition c required the '*introduction of a car parking management regime including the use of parking charges compatible with those in the region's network of major centres'*.

4.2.2 The area of Merry Hill (as part of the Brierley Hill strategic centre) to which the pre-conditions associated with CEN3 apply is outlined in **Figure 4-1** below within the thick **red** line boundary.

Figure 4-1: Merry Hill Quarter to which CEN3 Pre-Conditions Apply



Source: Appendix 7 of the Brierley Hill Area Action Plan

4.2.3 The purpose of CEN3 at the time of BCCS preparation was to manage expected growth across the Strategic Centres and particularly new comparison retail floorspace anticipated at Merry Hill. This growth in retail space has not materialised. In fact, the notable market trends impacting on town centre high streets and other shopping destinations as identified in the Stage 1 study, including a steady rise in online shopping compounded by the effects of the pandemic, indicate that significant new comparison retail floorspace in any centre is very unlikely to come forward.

4.2.4 As highlighted by the Black Country Centres Study, the economic environment and shopping trends have changed drastically in recent years with an increase in online retail and a move away from centres being the main focus for comparison shopping. There is now a no-growth scenario forecast for comparison retail provision within Brierley Hill Strategic Centre, including Merry Hill, up to the end of the BCP period (2039). The demand for new retail floorspace is anticipated to reduce significantly in future along with associated demand for on-site parking.

4.2.5 Although Merry Hill pre-conditions were taken forward as part of CEN3, they were a legacy of the Regional Spatial Strategy which was revoked in 2010. Furthermore,It is also noted that the Business and Planning Act 2020 introduced a broad category of commercial, business and service uses known as Class E, revoking the former Class A1 (retail), which brings into question the validity and effectiveness of any tool designed to profile large-scale retail provision specifically.

4.2.6 Paragraph 12.9 of the Black Country Centres Study discusses the subject of the pre-conditions applied to Merry Hill, concluding they are no longer fit for purpose. The study notes that the adoption of the Brierley Hill AAP in 2011 satisfies pre-condition a) and a number of public transport accessibility improvements around Merry Hill have been made or are in progress seeking to reduce car reliance, contributing to fulfilment of pre-condition b). See also paragraph 4.2.11 and Table 4-1 below.

4.2.7 With regards to pre-condition c), the retail floorspace threshold for the formal introduction of car park charges and management changes at Merry Hill has not been met. In light of Centres Study findings, historic information on variations in land use class at the site and changes in regulation since 2011, it is considered that the floorspace threshold is very unlikely to be triggered in future.

4.2.8 Notwithstanding this, it is evident that some charging, length of stay restrictions and discreet staff parking areas have been introduced at Merry Hill in the years since adoption of the Brierley Hill AAP. The Centres Study also highlights that approaches to parking and charging regimes within the other Strategic Centres have been changed both within and outside the influence of the planning system. This has resulted in variation in the balance of provision and charges for long and short stay parking, the offer of free parking linked to events and occasions at some locations, and where parking is controlled by store operators and private sector providers.

4.2.9 There is a clear need for all centres to be able to diversify in response to the changing market conditions and to include a mix of uses to support ongoing vitality and viability of the centres. It is recognised that Merry Hill is evolving and taking on a wider function as an established centre serving a growing local community rather than operating as an out of town shopping destination. This is evidenced by the incorporation of a food court, further future expansion of non-standard retail uses and further diversification planned through, for example, a potential leisure extension promoting a restaurant quarter to complement the existing food offer and the potential relocation and expansion of the cinema within the centre.

4.2.10 The Centres Study recommends that a proportionate threshold approach would be appropriate when considering new development, suggesting that an appropriate way forward would be to test how individual proposals will contribute to sustainability objectives and support mode shift. This would consider current circumstances and wider transport policy context.

4.2.11 Authorities are increasingly placing emphasis on reducing reliance on the private vehicle and achieving mode shift, increasing levels of sustainable travel and improving public transport accessibility, in particular. The most recent active travel and public transport improvements and ongoing investments within the Brierley Hill Strategic Centre are outlined in **Table 4-1**.

Table 4-1: Brierley Hill Strategic Centre Transport Investment

Transport Improvement/Investment	Location	Date of Implementation
Upgrade of Merry Hill bus station, including real time passenger information technology	Times Square Avenue	2016 - 17
Installation of a bus gate at Mill Street and associated highway works	Junction of The Boulevard and Mill Street	2015
Bus stop Real Time Passenger Information Technology	Various bus stops within the Strategic Centre	2015
Other bus specific and multimodal transport interventions in the vicinity of Merry Hill including bus stop upgrades and pedestrian crossing improvements	Various locations within the Strategic Centre	2011 - 2022
Pedestrian crossing across A4036 (Pedmore Road) and improved pedestrian link and environment linking to it on the Merry Hill (W) side	A4036 Pedmore Road/Merry Hill, linking Central Way with Nottingham Way	2015
Upgrading signals on Venture Way to enable enhanced traffic flow, including bus freeflow	Venture Way, Mill Street to High Street junction (A4100)	In progress
Advanced utilities and other ground preparation work on the Midland Metro route	Various locations within the Strategic Centre, including the site of the former Victoria Engineering works at The Gateway	In progress

4.2.12 Significant investment continues to be made with regards bus and tram provision in the area with Dudley Interchange coming forward and further investment committed to complete the Midland Metro network. This picture supports an alternative policy approach that will underpin and aim to significantly enhance the sustainable travel offer across the Black Country rather than continue to place the main focus on car park regimes and vehicular traffic management.

4.2.13 The evidence suggests there is no clear justification for the imposition of specific measures on the privately run car parks at Merry Hill, or any of the other strategic centres. With this in mind, a consistent policy approach that focuses on increased sustainable travel and accessibility for the Black Country centres would appear to have the potential for greater impact and is considered to be an appropriate way forward.

4.3 Draft Black Country Plan Policy CEN2

4.3.1 On the basis of the evidence gathered, the emerging approach as set out in the 2021 Draft BCP is to remove the emphasis of CEN3 away from Merry Hill to form a policy more applicable to all Strategic Centres. The relevant part of the replacement *Policy CEN2 Tier One: Strategic Centres (8)* in the Draft Plan is worded as follows:

> '*Accessibility: strategic centres should be accessible by a variety of means of transport, particularly walking, cycling and public transport. Proposals for commercial and business development that involve more than 500 sq m (gross) of floorspace within the primary shopping areas of the Black Country's strategic centres and well-linked edge-of-centre locations shall evidence the means to which they are compatible with the objectives of achieving sustainable development. This evidence must incorporate the setting out of provisions for the enablement or enhancement of sustainable means of travel and integrated modes of transport to and within individual strategic centres, with a particular focus on the management of demand for car parking and car-borne traffic, including through car parking regimes. Further details are set out in Policy TRAN6, and Local Development Plans.'*

4.3.2 In the light of the Regulation 18 Draft BCP consultation, reasonable adjustments to the policy parameters would add clarity:

> *'Accessibility: Strategic Centres should be accessible by a variety of means of transport, particularly walking, cycling and public transport. Proposals for commercial, leisure and business development that require a Transport Statement within Strategic Centres' boundaries shall evidence the means to which they are compatible with achieving sustainable development. This evidence must be proportionate to the scale and nature of the proposal and: incorporate provisions for the enablement and/or enhancement of sustainable means of travel and integrated modes of transport to and within Strategic Centres; have due regard to any sustainable transport projects and measures prioritised within Local Transport Plans and Local Planning Documents, including the management of demand for car parking, impact of car-borne traffic, and car parking regimes; and meet any relevant requirements set out in Policies TRAN6 and TRAN7.'*

4.3.3 This broader policy seeks to enable greater diversification and flexibility of uses across the Black Country Strategic Centres to help address high vacancy rates and a challenging commercial market. It is understood that the purpose is to better support growth aspirations, together with enabling complementary community, health and education uses, and market-led leisure and office uses, especially where they help to diversify the centre offer. The approach seeks a balance that also aims to protect existing convenience and comparison retail provision from further decline.

4.3.4 CEN2 promotes accessibility by a range of travel modes, with the main focus on public transport, walking and cycling, expressing the need to manage demand for car use and car parking in these interests. The policy promotes sustainable development proportionate to the scale and nature of the proposal to be considered on a case by case basis rather than placing emphasis on car park management. It does however indicate that the management of the demand for car parking and impact of car-borne traffic may include consideration of car parking regimes with cross-reference to draft policies TRAN6 and TRAN7.

4.3.5 The policy justification provided in the Draft Plan highlights a need for a common approach to car parking across the Strategic Centres, primarily to reduce the need to travel and support modal shift to more sustainable transport. This can be achieved by ensuring relevant proposed development within Strategic Centre boundaries all contribute to meeting this core objective, with due regard to any sustainable transport projects and measures as prioritised within Local Transport Plans and local planning documents. This approach should help manage the demand for car parking in Strategic Centres and allow local authorities to ensure an appropriate degree of equity and parity across all Black Country centres.

4.3.6 It is expected that further guidance and detail on requirements, particularly where they relate to parking, would be considered within the second tier planning documents at authority level. It is acknowledged that there are limitations to the influence that policy can have with regards private parking but the second tier policies and the imposition of planning obligations on new developments under this plan framework should seek to apply greater consistency.

4.3.7 The likely impact on car parking arising from the diversification of land use in Strategic Centres is not considered at Tier 1. Data analysed as part of this study has shown that there are many existing car parks currently under-utilised that, if developed for other purposes, could make a significant contribution to vitality and viability of centres objectives. Understanding the optimum net parking provision that balances sustainable travel, acknowledges the need for some car access and supports the transition to electric and increased automation of vehicles, will require a more robust and coordinated approach across the Black Country to data collection, analysis and the development of local planning policies.

4.3.8 There is a desire for there to be parity of approach to car parking across the Strategic Centres where possible. To achieve this it is suggested that the rationale for charges in different cirumstances is decided on a common basis and a shared approach to long and short stay management regimes agreed.

4.3.9 The provision and management of blue badge parking and electric vehicle provision would also be strengthened if there was a more coordinated approach across the Black Country. Whilst largely outside the planning regime, other parking management factors such as payment methods and enforcement regimes would benefit from being consistently applied across the region. However, the approach will need to recognise that there will be some local differences to reflect specific circumstances.

5 Task 4 – Appraisal of the Emerging Policy Approach and Policy Links

5.1 CEN2 – Tier 1: Strategic Centres

5.1.1 Draft BCP Policy CEN2 outlines the core priorities surrounding the future development of all Strategic Centres in the Black Country. It seeks to enable appropriate levels of diversification and flexibility to maximise investment and regeneration whilst addressing the fundamentals of sustainability, climate change and improving the health and well-being of local communities.

5.1.2 The relevant section (8) with regards accessibility and car parking is quoted in paragraph 4.3.1. The justification acknowledges that each centre currently has individual parking regimes that have evolved within and outside the influence of the planning system. It recognises a need to pursue a common approach going forward in order to enhance sustainable travel practices and encourage mode shift towards public transport, cycling and walking, as well as reducing the need to travel. The Draft BCP also identifies the role that relevant in-centre and edge-of-centre development can play in contributing to these objectives.

5.1.3 The overarching Tier 1 parking management principles underpinning BCCS Policy CEN8 and its associated provisions remain largely valid. However, the evidence suggests there is no longer clear justification for the imposition of measures on the car parks at Merry Hill, or those within any other Black Country centre, and there is a different legislative and policy framework in place compared to 2011.

5.1.4 Planning Policy Guidance Note 13 (PPG 13) on the subject of maximum parking standards has since been rescinded and was replaced by the National Planning Policy Framework (NPPF) in July 2021. NPPF places far greater focus on promoton of sustainable transport in plan-making and consideration of development proposals. It is advised that maximum parking standards should only be set where there is compelling justification and that local practices should take into account accessibility, development type and mix, public transport availability, the need to provide for electric vehicles and local car ownership levels.

5.1.5 Furthermore, the emerging West Midlands Local Transport Plan (WM LTP) 5 '*Reimagining Transport,'* in line with WM2041 and wider national policy, mirrors this strong emphasis on improved accessibility and decarbonisation including electrification of transport to support inclusive growth and to help tackle the climate emergency. The WM LTP is seeking to avoid a car-led recovery from the pandemic and focuses on reducing the need to travel by accessing services online, shifting travel to more sustainable patterns or modes such as public transport, cycling and walking, and the widespread adoption of low and zero emission vehicles (ZEVs).

5.1.6 CEN2 as worded largely reflects this current legislative and strategic policy position, placing the primary focus on enhancing accessibility by a wider range of travel modes, particularly public transport, walking and cycling.

5.2 TRAN6: Influencing the Demand for Travel and Travel Choices

5.2.1 Policy TRAN6 as worded in the Draft BCP states:

> *'1. The Black Country Authorities are committed to considering all aspects of traffic management in the centres and wider area in accordance with the Traffic Management Act 2004. The priorities for traffic management in the Black Country are:*
>
> *a) identifying appropriate strategic and local Park and Ride sites on current public transport routes to ease traffic flows into centres;*
>
> *b) working together with the rest of the region to manage region-wide traffic flows through the West Midlands Metropolitan Area Urban Traffic Control (UTC) scheme and further joint working;*
>
> *c) promoting and implementing Smarter Choices measures that will help to reduce the need to travel and facilitate a shift towards using sustainable modes of transport (walking, cycling, public transport, car sharing).'*

5.2.2 This confirms a continuing commitment to all aspects of traffic management in accordance with the Traffic Management Act 2004, which remains current. With regards parking, the priorities stated make reference to identification of strategic and local Park and Ride sites to encourage mode shift to public transport and alleviate traffic congestion on key routes. TRAN6 also promotes the continued implemention of Smarter Choices measures to reduce the need to travel and support mode shift.

5.2.3 It is reasonable not to include specific provisions within TRAN6 around parking as a traffic management tool, such as parking standards, pricing, type and location as was the case with BCCS TRAN5. These matters are now addressed separately in TRAN7, reflecting the renewed emphasis on encouraging modal shift to carbon neutral modes through infrastructure provision rather than through parking policy. There is no mention here however of the role of car park management in centres as a mechanism to influence travel choices and travel demand or any cross-reference back to associated policies CEN2 and TRAN7, which may have been expected.

5.2.4 It is also considered that the strength of wording in TRAN6 could include more contemporary terminology and better encourage localised access to key services such as through the introduction of mobility hubs. This is particularly relevant to Tier 2 and 3 centres, which TfWM has noted may lend themselves well to being '15 minute neighbourhoods' in its response to consultation on the Draft Plan.

5.3 TRAN7: Parking Management

5.3.1 Policy TRAN7 of the Draft BCP highlights the general role of parking provision and management in achieving sustainable transport and centres objectives.

5.3.2 For clarity, this separates out matters specific to parking from the policy approach related to influencing the demand for travel and travel choices (TRAN6) but they remain closely related. This is linked to the commitment made by local authorities to consider all aspects of traffic management in accordance with the Traffic Management Act 2004, with BCP policy seeking to foster greater consistency across the region and its centres where possible.

5.3.3 TRAN7 is currently phrased as follows:

> *'1.The priorities for traffic management in the Black Country include the sustainable delivery and management of parking in centres and beyond, through use of some or all of the following measures as appropriate:*
>
> *a) the management and control of parking - ensuring that it is not used as a tool for competition between centres;*
>
> *b) the type of parking – ensuring that where appropriate long-stay parking is removed from town centres, to support parking for leisure and retail customers and to encourage commuters to use more sustainable means and reduce peak hour traffic flows;*
>
> *c) maximum parking standards – ensuring that a consistent approach to maximum parking standards is enforced in new developments as set out in supplementary planning documents;*
>
> *d) the location of parking – by reviewing the location of town centre car parks through the "Network Management Duty", to ensure that the flow of traffic around town centres is as efficient as possible.'*

5.3.4 The key elements highlighted in TRAN7 would direct removal of long-stay parking from town centres where appropriate to encourage commuters to use more sustainable travel modes and to reduce peak hour traffic (directly supporting TRAN6), and encourage review of the location of town centre parking to facilitate the efficient flow of traffic. It also stipulates a need to apply a consistent approach to setting parking standards that is enforced in new developments.

5.3.5 The policy justification briefly mentions the role that reduced long-stay parking provision has in enabling more efficient use of land, however, it is not clear why this draft Policy only makes reference to town centres and it appears that the importance of good quality parking, including how parking interconnects with other modes, has been overlooked. Furthermore, it carries forward specific reference to setting 'maximum parking standards' which may no longer be relevant terminology given the current advice set out in NPPF, as summarised in paragraph 5.1.4.

5.3.6 The West Midlands Freight Strategy (2016) highlights the importance of safe and secure HGV parking as a tool to support economic growth and to help tackle road fuel consumption, highlighting a need to address localised HGV parking issues to support deliveries to and from centres, industrial areas and business parks etc. There is no reference to coach or freight parking within the Draft Plan; this does appear to be relevant to Policy TRAN4 '*The Efficient Movement of Freight'* and is directly linked to general parking management; the subject of TRAN7. It is also noted that TfWM have made a number of suggestions on TRAN4 that are related to sustainability, driver facilities and technology.

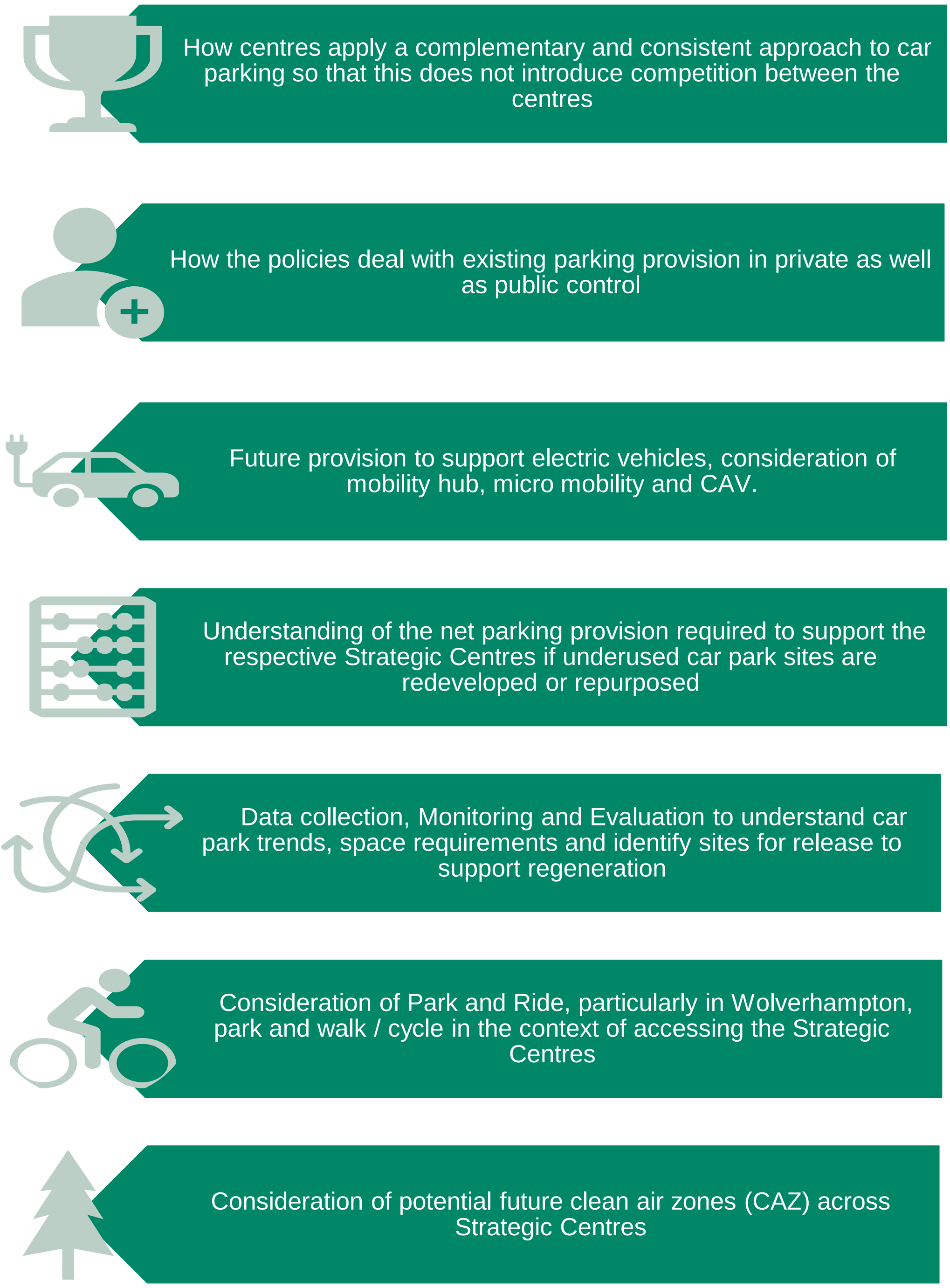
5.3.7 Little mention is made in the Draft Plan of the need to provide for emerging parking trends and technologies such as smart mobility opportunities, mobility hubs and development of '15 minute neighborhoods' - which TfWM note in particular may help encourage more active travel and improved localised access to key services. As a minimum, a cross-reference to TRAN8 '*Planning for Low Emission Vehicles'* would be expected here with regards to provision for electric vehicle charging and potentially docking facilities for e-scooters within car parks, and a link to TRAN5 '*Creating Coherent Networks for Cycling and for Walking'* would be beneficial where it relates to provision of cycle parking and integration of modes.

5.3.8 Other aspects related to the management and control of parking across Strategic Centres include a need for common approaches to parking enforcement and more consistent charging and payment regimes. These elements are not specifically mentioned in the Draft BCP but such practices could be important in achieving wider transport objectives. Furthermore, TRAN7 could be expanded upon to ensure adequate parking provision across the board for disabled car drivers and passengers. A statement of commitment in these areas within the BCP could suffice, with more detail to be provided in subsequent Tier 2 plans.

5.4 Additional Policy Considerations

5.4.1 There are a number of key themes that have emerged from this parking study which inform additional policy considerations related to the BCP and future Tier 2 policies. These are outlined in **Figure 5-1**.

Figure 5-1: Potential Additional Policy Considerations



5.4.2 In its formal representation to consultation on the Draft Plan Transport for West Midlands (TfWM) has stated the importance of working together as the West Midlands Local Transpot Plan and BCP develop to ensure both plans are fully aligned and it is suggested that the BCP should better reflect the commitments being established in wider funding streams and delivery programmes.

5.4.3 Evidence suggests that this approach can have a significant effect on mode shift away from the private vehicle, with management of car parking important but secondary in terms of its contribution to sustainability objectives. TfWM has also advised that the economic benefits of footfall generated by public transport and active travel modes are often underestimated in key centres and need to be more strongly emphasised in the policies.

5.4.4 It is considered that there is also a need to account for ‘smart mobility’ which seeks to provide better integration between travel modes and increased choice with public transport, Park and Ride, rental and subscription services, micro-mobility, active travel measures and electric vehicle charging facilities. Looking further forward, the requirements for Connected Autonomous Vehicles (CAV), increased automation of parking facilities and SMART ticketing for example will undoubtedly affect the future provision, operation and management of car parks.

Appendix A – 2009 Household Surveys

AECOM

Appendix A: Black Country Parking Study

Task 2b: Household Surveys 2009

Sandwell Metropolitan Borough Council

August 2022

Delivering a better world

Quality information

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1 Background

1.1.1 AECOM has been commissioned to undertake a study on car parking in Black Country Tier 1 and 2 centres to support the development of a justified policy approach towards car parking in Black Country strategic centres to inform the preparation of the Black Country Plan and guide decision making with regards to relevant individual proposals. The Plan will consider and direct development beyond the current plan period from 2026 up to 2038. This study has been divided into two stages: Stage 1 and Stage 2.

1.1.2 This 2009 household survey technical note has been produced to support Task 2b: Information and Evidence within the Stage 2 report. The original scope of Task 2 was to undertake a high-level analysis of comparisons of the 2009 and 2019 Household Surveys to provide additional data on parking patterns across the respective centres and changes in mode shift over time and to understand if the data indicates the role of parking in supporting the transition to sustainable transport. However, it was identified that there were too many variables and limitations between the 2009 and 2019 data to compare all transport questions together. Therefore, three separate reports have now been produced as follows:

- 2009 Household Surveys;
- 2019 Household Surveys; and
- 2009 and 2019 Household Survey Comparison (including limitations).

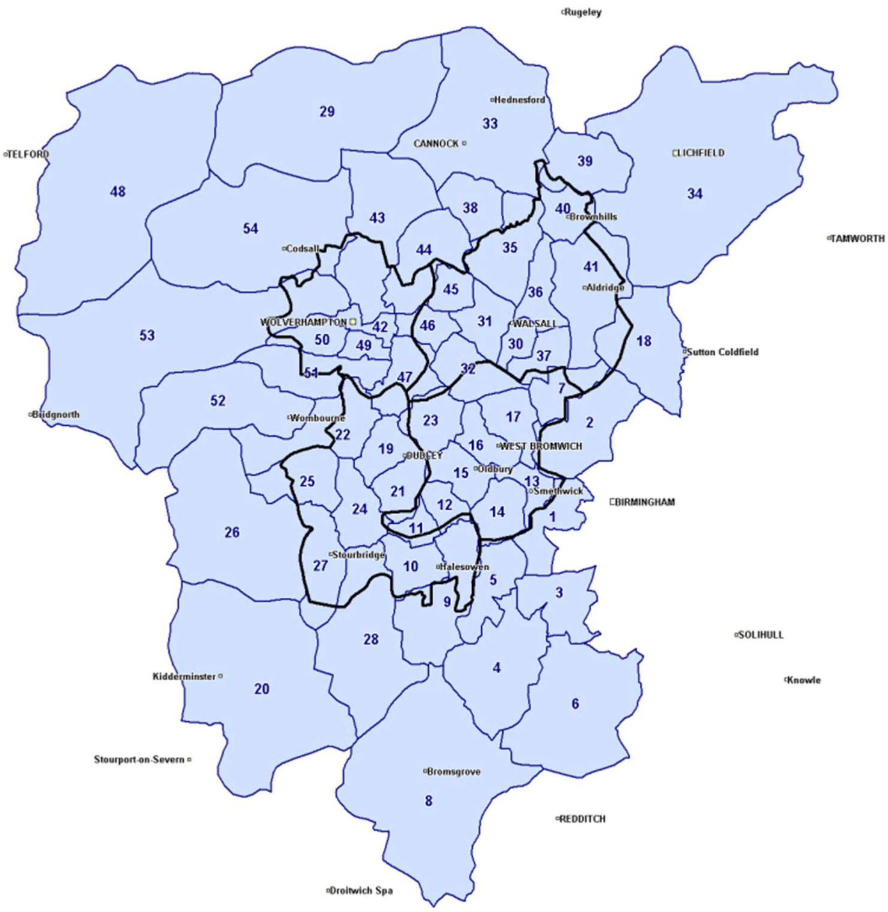
2 Introduction

2.1.1 The original purpose of the survey was to inform the Black Country Centres study, which was produced by GVA Grimley and published in November 2009. The survey data was originally used to assess the need for retail, office and commercial leisure development within the Black Country. Since this data was available and included transport-related data, the survey has been reviewed for the purposes of thie Black Country Parking Study. Some non-transportation related questions have been disregarded for the purpose of this study.

2.1.2 This 2009 household survey technical report provides a methodology and highlights any limitations within the survey and data. A high-level summary of findings has also been outlined within this technical note.

2.1.3 The 2009 survey covered 4,500 households over 54 postal code zones, as shown in **Figure 2-1**.

Figure 2-1: 2009 Household Survey Zones



2.1.4 **Annex A** of this report provides a comprehensive breakdown of all the survey questions for 2009. The questions and answers relevant to car parking and transport have been analysed. It is noted that many of the questions were not analysed, due to the lack of data concerning the mode of travel or any relationships that could provide insights into travel behaviours. From the 2009 surveys, 12 out of 28 questions (42%) have been disregarded.

2.1.5 All of the 2009 questions that have been analysed can be found in **Annex B** within this report.

3 Limitations

3.1.1 There are several limitations to this survey data due to the survey not being explicitly produced for understanding transport or parking related matters. Therefore, this analysis should be considered for general trends and not be used as key evidence for policy decisions.

3.1.2 One fundamental limitation is that the zones, as shown in **Figure 2-1,** do not align with the Local Authority boundaries. Therefore, a 'Best Fit' methodology of the zones for the Black Country has been applied. This means that some boundaries overlap and the majority area has been used where this occurs. It should be noted that no double counting has occurred.

3.1.3 As previously mentioned, not all questions related to transport and most questions did not ask about the modal choice to specific destinations, such as Merry Hill shopping centre. Therefore, where these applied, questions have not been analysed.

3.1.4 Additionally, where there were multiple choice answers, such as questions relating to likes, dislikes, and improvements; only suggestions related to parking or transport were analysed.

3.1.5 Furthermore, questions that had a 'free parking' preference option or similar do not relate to specific retail sites and the preference stated cannot therefore be attributed to specific retail locations.

4 2009 Household Survey Analysis

4.1 Location Of Households' Main Food Shopping

Question One

In which shop or shopping centre do you do most of your household's main food shopping? (Not including don't do or internet / delivered at Q01)

4.1.1 The answers to this question were difficult to interpret, due to the Volume and format of the data. Nonetheless, shops have been grouped based on the shop addresses into strategic and town centres.

4.1.2 The results are shown in **Table 4-1**, with conditional colour formatting being applied to each local authority column, with **Red** = highest percentage, **Amber** = mid-range percentage, and **Green** = lowest percentage.

Table 4-1: Household Main Shopping Centre Locations

Question 1		Participant Locations				
Household main shopping centres within Black Country strategic centres and town centres		Dudley MBC	Sandwell MBC	Walsall MBC	CoW	Outside LA Areas
Dudley MBC	Brierley Hill	30.8%	1.1%	0.0%	0.4%	0.8%
	Dudley	15.1%	4.1%	4.8%	5.3%	6.1%
	Halesowen	4.0%	0.9%	0.0%	0.0%	0.4%
	Stourbridge	0.9%	0.0%	0.0%	0.2%	1.1%
Sandwell MBC	West Bromwich	0.1%	6.1%	0.4%	0.0%	0.4%
	Bearwood	0.0%	0.0%	0.0%	0.2%	0.1%
	Blackheath	5.9%	6.8%	0.0%	0.0%	1.4%
	Cape Hill	0.3%	8.3%	0.1%	0.2%	2.9%
	Cradley Heath	0.3%	0.4%	0.0%	0.0%	0.5%
	Great Bridge	0.0%	0.0%	0.0%	0.0%	0.2%
	Oldbury	1.8%	19.9%	0.4%	0.4%	1.2%
	Wednesbury	0.5%	4.3%	4.8%	0.4%	0.0%
Walsall MBC	Walsall	2.3%	8.4%	28.1%	4.3%	0.4%
	Aldridge	0.3%	0.0%	7.1%	0.0%	0.3%
	Bloxwich	0.3%	0.0%	8.7%	0.6%	0.3%
	Brownhills	0.0%	0.0%	0.1%	0.0%	0.4%
	Darlaston	3.5%	3.8%	0.0%	0.0%	0.1%
	Willenhall	0.1%	0.0%	2.1%	0.4%	0.0%
CoW	Wolverhampton	1.6%	0.4%	0.7%	41.2%	5.9%
	Bilston	0.9%	1.8%	1.5%	16.8%	0.2%
	Wednesfield	0.0%	0.0%	1.5%	11.6%	0.1%
Merry Hill, including Merry Hill shopping centre		0.0%	0.0%	0.0%	0.0%	1.2%
Don't know / varies		0%	0.0%	7.1%	0.0%	0.3%
Other		0.0%	0.9%	0.0%	0.0%	0.0%
Outside BC Strategic Centres and Town Centres		31.5%	33.2%	32.5%	17.9%	75.7%

4.1.3 The results show that approximately half of the participants surveyed conducted their main shop outside of their local centres, apart from Wolverhampton and those participants living Outside the Black Country Local Authority areas, where the there is at least a 20% increase compared to the other Black Country Boroughs, as shown in **Table 4-2**.

Table 4-2: Overview of Participants' Main Food Shopping Locations

Main Shopping Centres within Black Country strategic centres and town centres	Participant Locations				
	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Dudley MBC Total	51%	6%	5%	6%	8%
Sandwell MBC Total	9%	45%	6%	1%	7%
Walsall MBC Total	7%	12%	46%	5%	1%
City of Wolverhampton Total	2%	2%	4%	70%	6%
Other	31%	34%	40%	18%	77%

4.1.4 Around 50% of participants live and complete their food shop in the same local authority. However, Wolverhampton has a slightly higher proportion at 70% that complete their main shop within the local authority. This difference could be due to having 16 stores in the area, with larger stores available, such as Aldi, Sainsbury's, Netto, Sommerfield and Waitrose.

4.2 Household Mode of Travel to Main Food Shopping Destination

Question Two

How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?

4.2.1 For this data set the mode of travel could not be linked to specific shopping locations and some of the modes of travel have been excluded from analysis since there were less than 1% of participants answering. These included Park & Ride, motorcycles, and bicycles.

4.2.2 **Figure 4-1** shows that most people use car/van as a driver or passenger to complete their main food shop. There is no considerable difference between the percentages that use the bus or walk.

Figure 4-1: Transport Mode Choice to Main Food Shopping Destination

4.2.3 In all areas, it was found that the main mode used for main food shopping was car as a passenger or driver at around 80%, but Sandwell has the lowest car use at 70%. Bus use was the second most used mode, with Sandwell having the highest bus use at 15% and Dudley having the lowest bus use at 7%. Walking was third choice with 11% walking in Sandwell and both Dudley and Wolverhampton being the lowest at 7%.

4.2.4 However, it would have been expected that Wolverhampton would have had a higher walking rate since people shop within their local authority area, but this trend is not displayed. It could mean that people use the car no matter the distance to their chosen main food shopping destination.

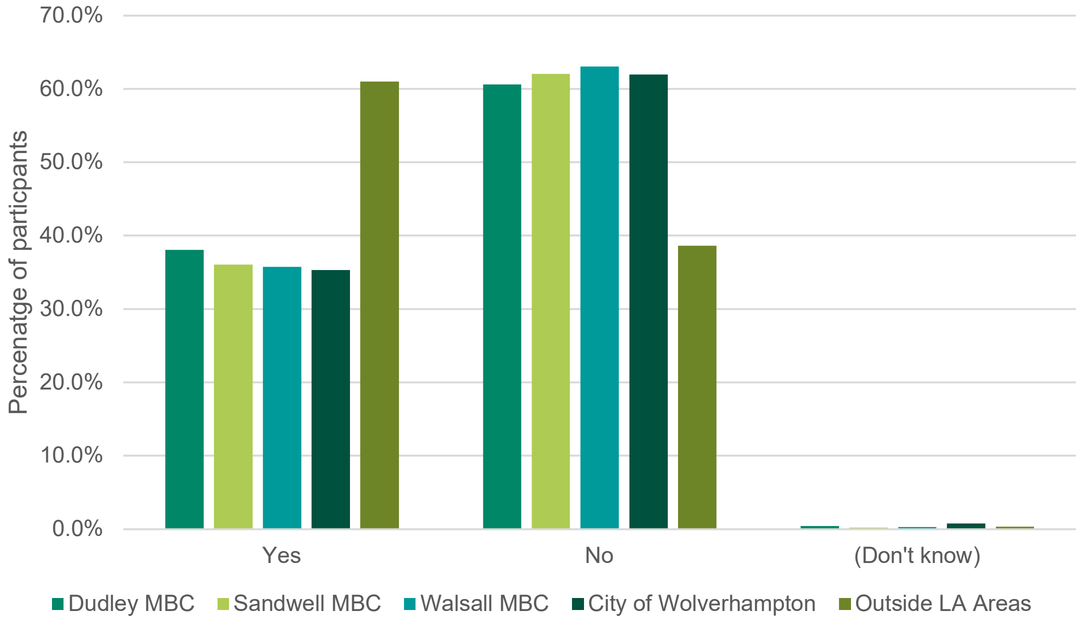
4.3 Combined Trips of Main Food Shop And Other Activities

Question Three

When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example, non-food shopping, leisure/entertainment activities, restaurants, bars, banks, etc.? Those who used a shop or shopping centre (not including internet / delivered) at Q01.

4.3.1 This question allowed us to understand if participants combined their household's main food shopping trip with other activities/trips, as shown in **Figure 4-2**. The data does not allow us to identify the type of linked trip and whether it was en route or involved a diversion. The data also does not allow any relationship between mode choice and whether a linked trip was made.

Figure 4-2: Overview of Linked Trips for Main Food Shop and Other Activities



4.3.2 Nonetheless, all local authority respondents that answered “don’t know” were less than 1% in each area. It should be noted that the mode of the linked trips is unknown.

4.3.3 All Black Country local authority areas show an approximately 35% linked trips, with the majority (60%+), not combining the purpose for trips. The only expectation is outside the Black Country local authority area where there is an appreciably higher proportion of linked trips. The distance of travel to the destination is likely to be a key factor here.

4.4 Location of Town Centre, Freestanding Store or Retail Park for Clothes Shopping

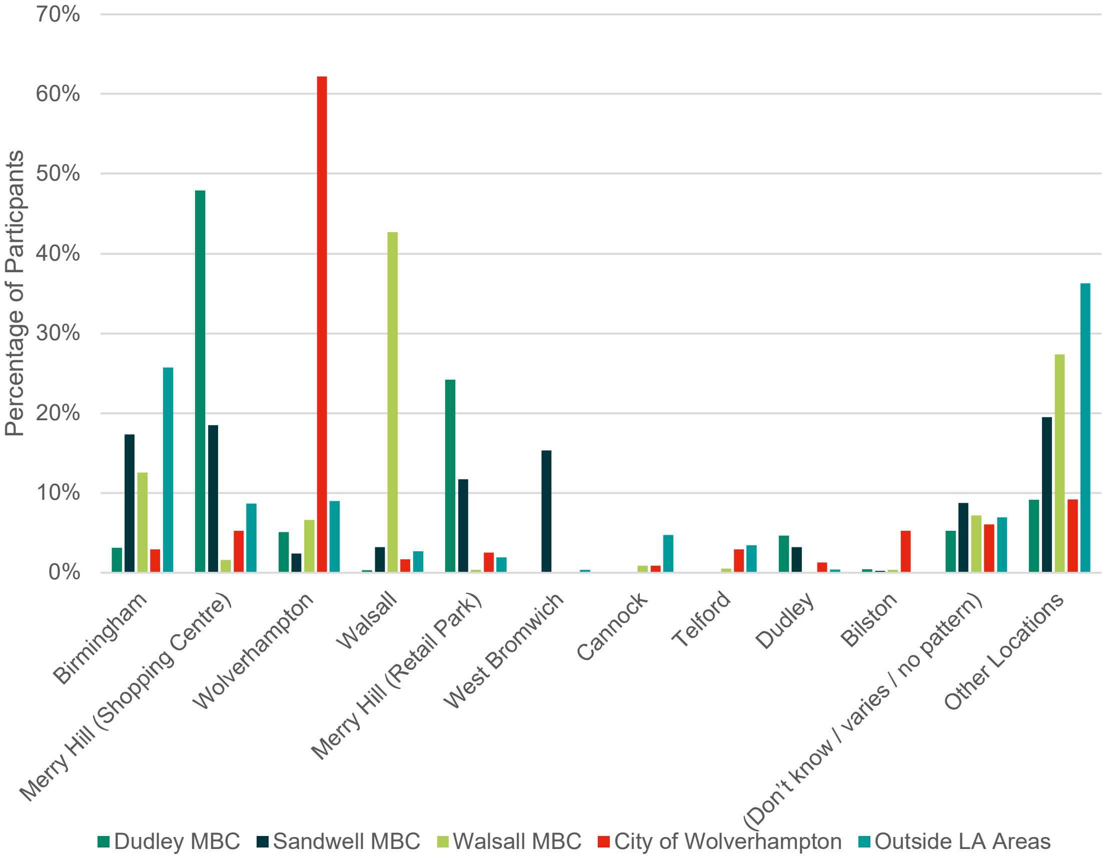
Question Five

In which town centre, freestanding store or retail park do you do most of your household's shopping for clothing, footwear and other fashion goods? (Not including internet/catalogue/mail order/tv shopping, abroad or don't buy at Q05)

4.4.1 Any town centres outside the Black Country local authority area and that have a total participant selection of less than 5% have been amalgamated into the ‘Other Locations’ category. Birmingham, Cannock, and Telford, whilst outside the Black Country Local Authority Area have been analysed separately due to the significant number of participants citing these as destinations visited for clothes shopping. Additionally, ‘don’t know/varies/no pattern’ is the participant's original answer.

4.4.2 **Figure 4-3** provides an overview of the destinations that participants use to shop for clothing, footwear and other fashion goods.

Figure 4-3: Location of Town Centre, Freestanding Stores or Retail Park for Clothes Shopping



4.4.3 This shows that the highest proportion of Wolverhampton participants shop in the Wolverhampton area. This trend is similar in Walsall but at a lower proportion. It should be noted that Merry Hill shopping centre and Merry Hill retail park have been included, but these are considered separate entities, although there is the possibility that people may use both due to the proximity.

4.4.4 Additionally, a high proportion of all participants travel to Birmingham outside of the participant survey area. This is likely as it is the regional centre and the retail shopping offer as well as the leisure activities available. Similarly, Merry Hill shopping centre and retail park with considerable proportions of people citing these as their clothes centre destination.

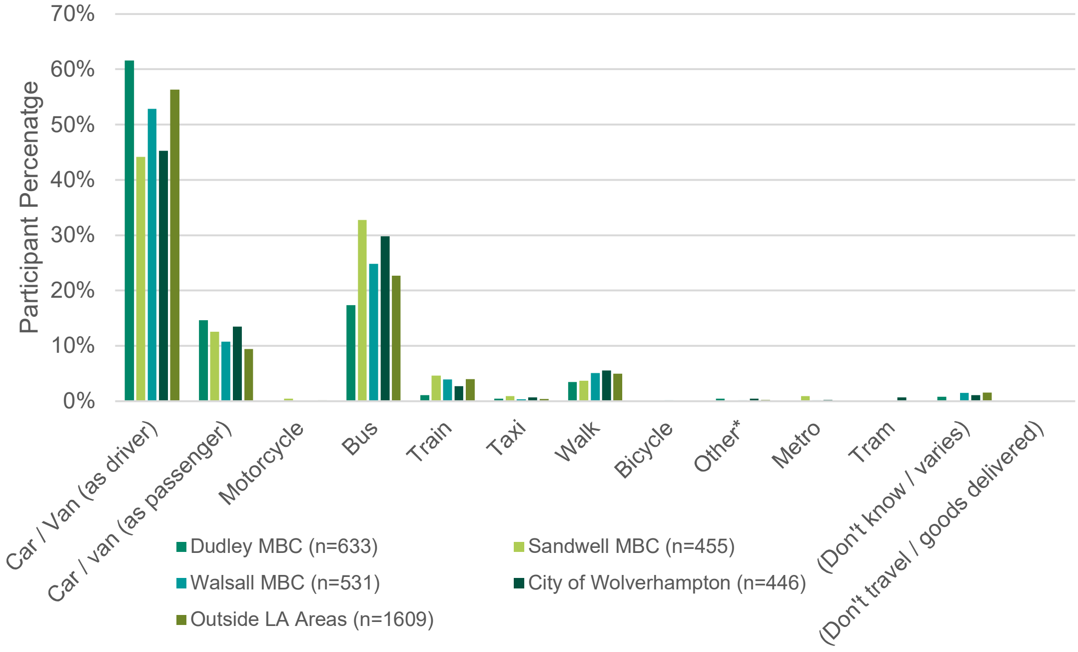
4.5 Mode Of Travel To Main Clothing Shopping Destination

Question Six

How does your household normally travel to its main clothing and footwear shopping destination (LOCATION MENTIONED AT Q05)? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05

4.5.1 **Figure 4-4** shows that the most used mode is by car/van (as a driver) ranging from 44% to 62% in all participant Local Authority areas. It should be noted that the category of 'Other*' also includes participants that choose Mobility Scooter and Ring and Ride Charity Bus.

Figure 4-4: Overview of Mode of Choice for Clothing and Footwear Shopping Destinations



4.5.2 In relation to modal use for accessing clothing and footwear shopping destinations, it shows car/van (as a driver or passenger) and bus are the top three most popular choices for all local authority areas. Dudley MBC has the highest use of cars and vans as a driver or as a passenger at 76% and Sandwell has the lowest at 57%. However, the use of the car in Sandwell is still the main mode used to access clothing and footwear shopping destinations.

4.6 Transport Related 'Likes' About The Clothing Shopping Destinations

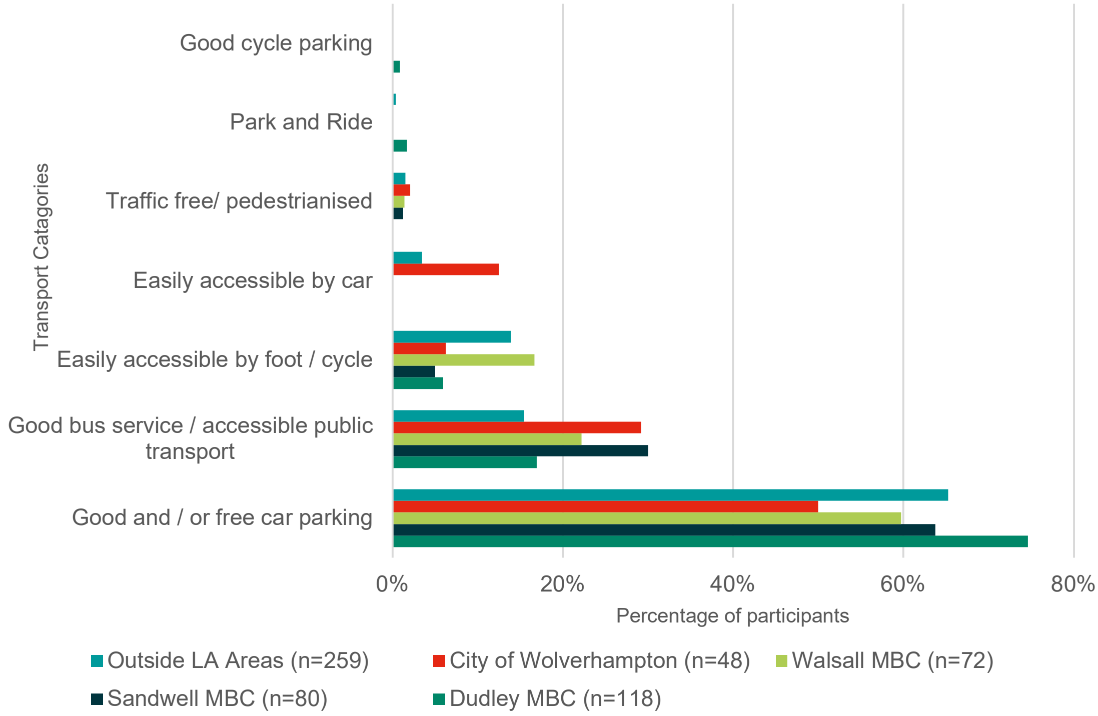
Question Seven

What do you like about the (LOCATION MENTIONED AT Q05)? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05

4.6.1 **Figure 4-5** shows the transport related likes of participants' chosen shopping destination for clothing and footwear. It should be noted that non-transport related 'likes' have been disregarded as irrelevant to this transport and parking study.

4.6.2 In all areas, the analysis shows that 'Good and/or free car parking' is considered important by respondents with percentages citing this ranging from 50% in the city of Wolverhampton and up to 75% for Dudley. Given that most people use car/van as a driver or passenger, as evidenced above, the 'good and/or free car parking' may be considered a significant aspect in participants choise of shopping location.

Figure 4-5: Transport Related Categories of 'Likes' of Town Centre, Freestanding or Retail Park for Household Clothing, Footwear and Other Fashion Goods



4.6.3 Good bus service/accessible public transport is cited by a significant percentage of respondents, which may indicate that this mode choice would be a significant factor in the attractiveness of a centre.

4.6.4 It is noted that a lower proportion of respondents indicate that 'easily accessible by car' is a significant 'like' for a centre.

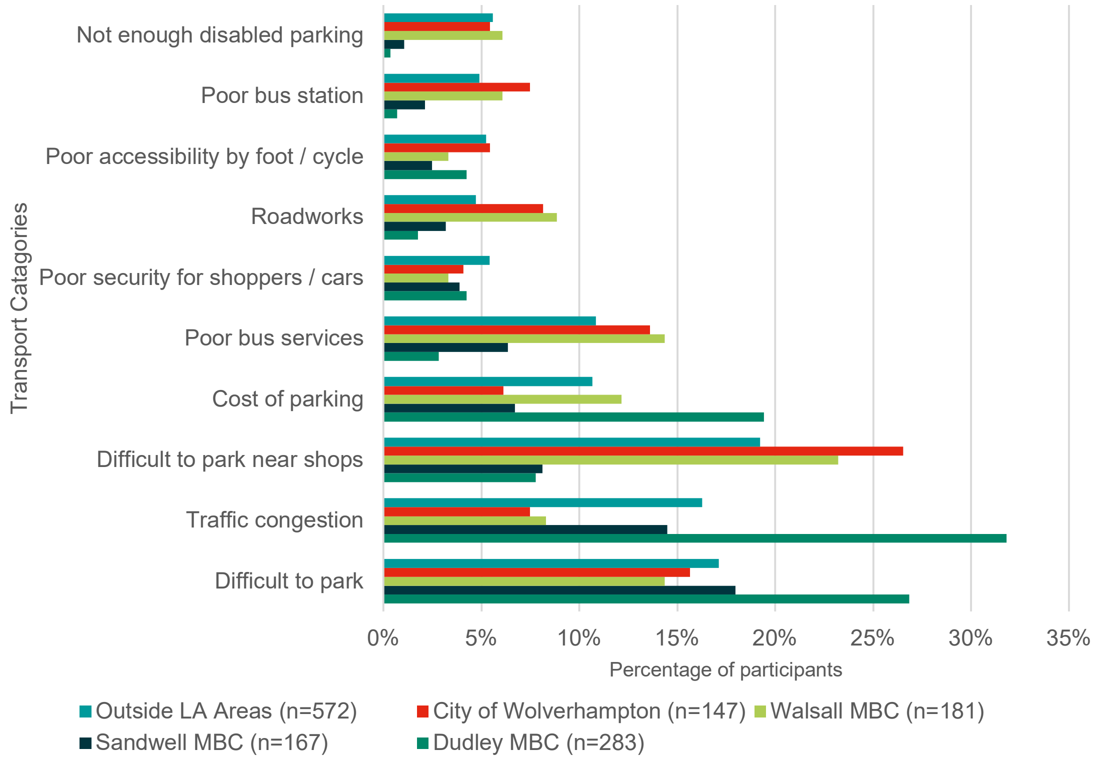
4.7 Transport Related 'Dislikes' of Clothing Shopping Destinations

Question Eight

What do you dislike about (LOCATION MENTIONED AT Q05)? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05

4.7.1 **Figure 4-6** shows the transport-related dislikes of the town centre, freestanding or retail park for household clothing, footwear and other fashion goods.

Figure 4-6: Transport Related Categories of 'Dislikes' of Town Centre, Freestanding or Retail Park for Household Clothing, Footwear And Other Fashion Goods



4.7.2 The greatest dislike of the destinations is 'difficulty to park', with the highest percentage of respondents from Dudley highlighting this at 27%. However, 'difficult to park near shops' in Dudley did not have a similar response, as only 8% agreed, but 27% of participants in Wolverhampton and 23% in Walsall did agree.

4.7.3 In Dudley, 32% agreed that they disliked traffic congestion, followed by outside Local Authorities areas at 16% and Sandwell at 14%. Therefore, this suggests that centres near and around Dudley may be perceived to be particularly difficult to park and affected by traffic congestion. It is not possible to establish if Dudley respondents considered Merry Hill in their answer.

4.7.4 All other categories scored less than 20%, suggesting that these are not significant issues.

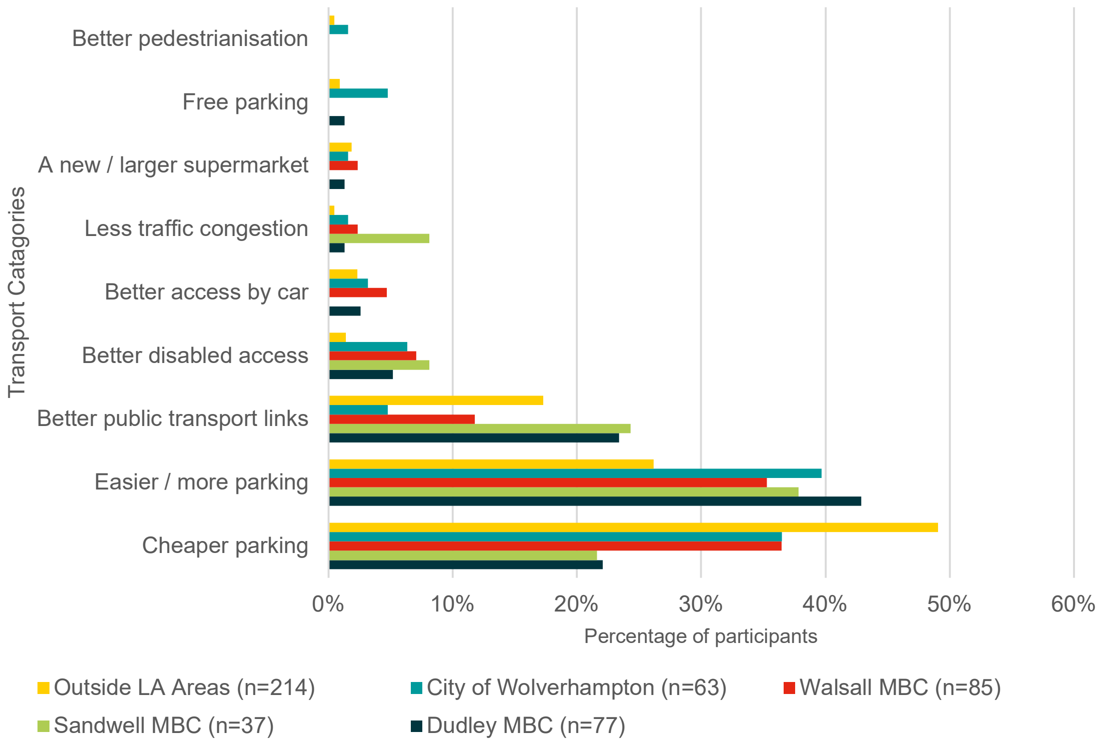
4.8 Transport Related Improvements for Clothing and Footwear Shopping Destinations

Question Nine

What would make you shop in or visit (LOCATION MENTIONED AT Q05) more often? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05

4.8.1 **Figure 4-7** shows the transport-related categories that make you shop in or visit the chosen town centre, freestanding or retail park more often for household clothing, footwear and other fashion goods.

Figure 4-7: Transport Related Improvements that Make You Shop in or Visit Chosen Town Centre, Freestanding or Retail Park More Often for Household Clothing, Footwear and Other Fashion Goods



4.8.2 The top three improvements were ‘cheaper parking’, ‘easier/more parking’ and ‘better public transport links’. This is in line with the likes and dislikes, as mentioned above.

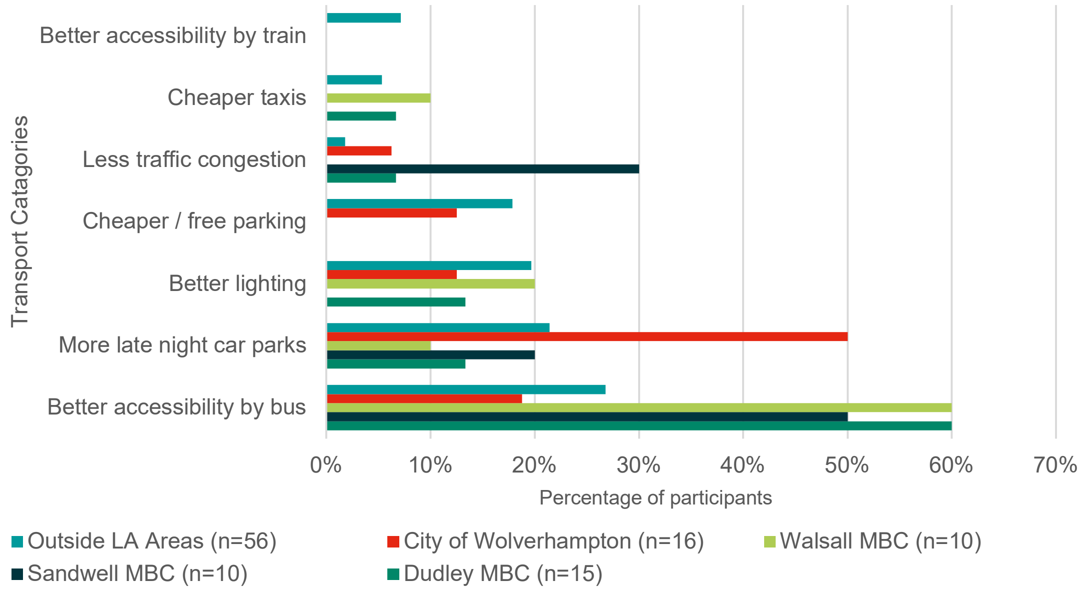
4.9 Encourage Participants to Stay Longer at Their Clothing Shopping Destinations

Question 11

What would make you stay longer in (location mentioned at Q05) to use it in the evenings? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05

4.9.1 **Figure 4.8** shows the transport-related reasons that make participants stay longer at the town centre, freestanding or retail park for household clothing, footwear and other fashion goods.

Figure 4-8: Transport Categories Related to Increasing Stay for Town Centre, Freestanding or Retail Park for Household Clothing, Footwear and Other Fashion Goods



4.9.2 Better accessibility by bus was stated by over 50% in Walsall and Dudley. Additionally, Wolverhampton had around 50% respond suggesting more late-night car parks. This could be based on the location and the availability of evening and leisure facilities such as theatre and bars/restaurants, where access to later parking is required.

4.10 2009 Survey Participation Characteristics

GEN Gender of respondent

4.10.1 Gender has been analysed to understand if there is parity in the levels of gender participation across all areas, which is shown in **Table 4-3.**

Table 4-3: Gender of Respondents

		Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Gender	Male	26%	27%	29%	32%	28%
	Female	74%	73%	71%	68%	72%

4.10.2 On average, 72% of all respondents were female, with a range between 68% to 74%. Therefore, it is considered gender participation in the survey to be relatively evenly distributed throughout all areas.

AGE Could I ask how old you are?

4.10.3 Age has been analysed and the results are depicted in **Table 4-4**. This has been used to understand the distribution across all areas since this could influence the results, especially mode choice and destinations.

Table 4-4: Participant Age Distribution

		Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Age	18 to 24	2%	2%	3%	3%	2%
	25 to 34	6%	8%	7%	7%	8%
	35 to 44	18%	17%	15%	14%	19%
	45 to 54	25%	19%	23%	22%	27%
	55 to 64	14%	16%	17%	15%	14%
	65 +	35%	37%	34%	38%	29%
	(Refused)	0%	1%	1%	1%	0%

4.10.4 Most participants who took part in the survey were aged 35 to 65+. However, a significant proportion of these participants were aged 65+, although this ranges from 29% to 38%. This range is considered to be significant with nearly a 10% difference between the lowest percentage and the highest. Those, participants from 'Outside of Local Authority Areas' tended to be of a younger profile compared to other areas.

SEG Socio-economic grouping

4.10.5 A question about Socio-economic grouping was asked to participants and the results are shown in **Table 4-5**.

Table 4-5: Socio-Economic Grouping

Socio-economic grouping:	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
A: High managerial, administrative or professional	2%	1%	3%	2%	2%
B:Intermediate managerial, administrative or professional	14%	9%	14%	12%	17%

C1: Supervisory, clerical and junior managerial,administrative or professional	22%	23%	22%	20%	25%
C2:Skilled manual workers	22%	18%	20%	22%	21%
D:Semi and unskilled manual workers	12%	13%	14%	13%	11%
E: State pensioners, casual or lowest grade workers, unemployed with state benefits only	22%	28%	21%	25%	19%
(Refused)	6%	9%	6%	7%	5%

4.10.6 This shows a varied and broad range of socio-economic grouping. Originally, the classification in the question was A, B, C1, C2, D and E and the definition of each category added during the analysis. It is unknown how this question was asked to participants, as it was unlikely that they would know the classification. Additionally, a high proportion also refused to answer.

EMP *Which of the following best describes the chief wage earner of your household's current employment situation?*

4.10.7 In addition to socio-economic the chief wage earner was also assessed and the results are shown in **Table 4-6**.

Table 4-6: Chief Wage Earner

		Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Chief wage earner	Working full time	48%	42%	47%	39%	50%
	Working part time	7%	7%	7%	7%	8%
	Unemployed	3%	5%	5%	7%	5%
	Retired	41%	44%	39%	42%	36%
	A housewife	0%	1%	1%	2%	1%
	A student	0%	0%	0%	1%	0%
	Other (including incapacity benefits)	0%	0%	0%	0%	0%
	(Refused)	0%	0%	0%	1%	0%

4.10.8 This shows that most participants were working full time or retired and these were proportionately distributed across all areas.

CAR *How many cars does your household own or have the use of?*

4.10.9 Car ownership was also assessed, which is an important consideration when determining the preferred mode of travel of participants. The finds of this are shown in **Table 4-7**.

Table 4-7: Car Ownership

		Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Cars household own or have use of	None	14%	27%	18%	25%	17%
	One	45%	48%	44%	47%	42%
	Two	30%	19%	29%	20%	31%
	Three or more	9%	4%	8%	6%	9%
	(Refused)	1%	2%	1%	1%	1%

4.10.10 It should be noted that there is a large range of car ownership between local authority areas, as this ranges from 14% to 27% for non car ownership. However, the levels of households owning at least one car are considered to be relevantly consistent.

INC *Approximately what is your total household income?*

4.10.11 A question has been asked to understand the household income of the participants. The results are displayed in **Table 4-8.**

Table 4-8: Approximately What Is Your Total Household Income?

	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
£0 - £14,999	15%	24%	18%	25%	17%
£15,000 - £19,999	5%	8%	5%	6%	5%
£20,000 - £29,999	8%	8%	6%	6%	7%
£30,000 - £39,999	8%	4%	6%	6%	6%
£40,000 - £49,999	4%	5%	5%	5%	6%
£50,000 - £59,999	4%	2%	2%	3%	4%
£60,000 - £69,999	1%	1%	1%	1%	2%
£70,000 - £79,999	1%	1%	2%	0%	2%
£80,000 - £89,999	1%	0%	1%	0%	1%
£90,000 - £99,999	0%	0%	0%	0%	1%
£100,000 - £149,999	1%	0%	1%	2%	1%
£150,000+	0%	0%	0%	0%	0%
(Don't know / refused)	51%	47%	53%	45%	47%

4.10.12 In relation to household income, the majority of people were in the £0-£14,999 bracket, but this did range between 15% and 25% across the local authorities. However, almost half of the participants in this survey didn’t know or refused to answer.

ETH *The following question will be used in a statistical format only, and will help us to assess diverse needs and the level of access to services. What is your ethnic background?*

Table 4-9: Ethnic Background

		Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Ethnic Background	White (British / Irish / Other)	96%	89%	94%	93%	94%
	Black / Black British (Caribbean / African / other black)	1%	4%	1%	2%	2%
	Asian / Asian British (Indian / Pakistani / Bangladeshi / Other Asian)	2%	4%	3%	4%	2%
	Mixed (any mixed category)	0%	1%	1%	0%	1%
	Chinese	0%	0%	0%	0%	0%
	Other	0%	0%	0%	0%	0%
	(Refused)	2%	3%	2%	1%	2%

4.10.13 The analysis shows that the majority of participants were from a White (British / Irish / Other) background and these ranged from 89% to 96% across all local authorities. It is considered that all ethnic backgrounds were evenly distributed between all local authority areas with no significant differences between areas. However, the number of respondents from Black / Black British (Caribbea / African / other Black) and Asian / Asian British (Indian / Pakistani / Bangladeshir / Other Asian) are considered to be very low in relation to the ethnic background of the resident population in Black Country Local Authority areas.

Annex A – 2009 Household Survey Questions

Table A-1. All 2009 Questions Asked

	2009	
	Question	Analysed
Q01	In which shop or shopping centre do you do most of your household's main food shopping ? (Not including don't do or internet / delivered at Q01)	Yes
Q02	How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?	Yes
Q03	When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example non-food shopping, leisure / entertainment activities, restaurants, bars, banks, etc? Those who used a shop or shopping centre (not including internet / delivered) at Q01	Yes, linked trips
Q04	Where do you do most of your household's small scale 'top-up' food shopping ? (i.e. to buy bread, milk, etc, on a day-to-day basis) (Not including don't do or internet / delivered at Q04)	No
Q05	In which town centre, freestanding store or retail park do you do most of your household's shopping for clothing, footwear and other fashion goods? (Not including internet / catalogue / mail order / tv shopping, abroad or don't buy at Q05)	Yes
Q06	How does your household normally travel to its main clothing and footwear shopping destination (LOCATION MENTIONED AT Q05)? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Yes
Q07	What do you like about the (LOCATION MENTIONED AT Q05) ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Particle parking and transport related responses
Q08	What do you dislike about (LOCATION MENTIONED AT Q05) ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Particle parking and transport related responses
Q09	What would make you shop in or visit (LOCATION MENTIONED AT Q05) more often ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Particle parking and transport related responses
Q10	How often do you visit (LOCATION MENTIONED AT Q05) in the evenings ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	No
Q11	What would make you stay longer in (LOCATION MENTIONED AT Q05) to use it in the evenings? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Yes
Q12	Where do you do most of your households shopping for furniture, floor coverings and household textiles ? (Not including internet / catalogue / mail order / tv shopping or don't buy at Q12)	No

2009

	Question	Analysed
Q13	Where do you do most of your households shopping for DIY and decorating goods ? (Not including internet / catalogue / mail order / tv shopping or don't buy at Q13)	No
Q14	Where do you do most of your households shopping for domestic appliances such as washing machines, fridges cookers and kettles ? (Not including internet / catalogue / mail order / tv shopping or don't buy at Q14)	No
Q15	Where do you do most of your households shopping for TV, Hi-Fi, Radio, photographic and computer equipment ? (Not including internet / catalogue / mail order / tv shopping, abroad or don't buy at Q15)	No
Q16	Where do you do most of your households shopping on personal / luxury goods including books, jewellery, china, glass and cosmetics ? (Not including internet / catalogue / mail order / tv shopping, abroad or don't buy at Q16)	No
Q17	Do you take part in any of the following leisure or cultural activities ?	No
Q18	Where do you go most often to visit the cinema ? Those who visit the cinema at Q17	No
Q19	What town centre do you visit most often for pubs / clubs ? Those who visit pubs / clubs at Q17	No
Q20	What town centre do you visit most often for restaurants/eating out? Those who visit restaurants / eat out at Q17	No
Q21	Are there any leisure facilities that you think are lacking within a reasonable distance of your home?	No
GEN	Gender of respondent.	Yes
AGE	Could I ask how old you are ?	Yes
SEG	Socio-economic grouping:	Yes
EMP	Which of the following best describes the chief wage earner of your household's current employment situation ?	Yes
CAR	How many cars does your household own or have the use of ?	Yes
INC	Approximately what is your total household income ?	Yes
ETH	The following question will be used in a statistical format only, and will help us to assess diverse needs and the level of access to services. What is your ethnic background ?	Yes

Source: 2009 Household Surveys

Annex B - 2009 Questions Analysed

	2009
Q01	In which shop or shopping centre do you do most of your household's main food shopping ? (Not including don't do or internet / delivered at Q01)
Q02	How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?
Q03	When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example non-food shopping, leisure / entertainment activities, restaurants, bars, banks, etc? Those who used a shop or shopping centre (not including internet / delivered) at Q01
Q05	In which town centre, freestanding store or retail park do you do most of your household's shopping for clothing, footwear and other fashion goods? (Not including internet / catalogue / mail order / tv shopping, abroad or don't buy at Q05)
Q06	How does your household normally travel to its main clothing and footwear shopping destination (LOCATION MENTIONED AT Q05)? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05
Q07	What do you like about the (LOCATION MENTIONED AT Q05) ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05
Q08	What do you dislike about (LOCATION MENTIONED AT Q05) ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05
Q09	What would make you shop in or visit (LOCATION MENTIONED AT Q05) more often ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05
Q10	How often do you visit (LOCATION MENTIONED AT Q05) in the evenings ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05
Q11	What would make you stay longer in (LOCATION MENTIONED AT Q05) to use it in the evenings? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05
GEN	Gender of respondent.
AGE	Could I ask how old you are ?
SEG	Socio-economic grouping:
EMP	Which of the following best describes the chief wage earner of your household's current employment situation ?
CAR	How many cars does your household own or have the use of ?
INC	Approximately what is your total household income ?
ETH	The following question will be used in a statistical format only, and will help us to assess diverse needs and the level of access to services. What is your ethnic background ?

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Appendix B – 2019 Household Surveys

Appendix B: Black Country Parking Study

Task 2b: Household Surveys 2019

Sandwell Metropolitan Borough Council

August 2022

Delivering a better world

Quality information

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1 Background

1.1.1 AECOM has been commissioned to undertake a study on car parking in Black Country Tier 1 and 2 centres to support the development of a justified policy approach towards car parking in Black Country strategic centres to inform the preparation of the Black Country Plan and guide decision making with regards to relevant individual proposals. The Plan will consider and direct development beyond the current plan period from 2026 up to 2038. This study has been divided into two stages: Stage 1 and Stage 2.

1.1.2 This 2019 household survey technical note has been produced to support Task 2b: Information and Evidence within the Stage 2 report. The original scope of Task 2 was to undertake a high-level analysis of comparisons of the 2009 and 2019 Household Surveys to provide additional data on parking patterns across the respective centres and changes in mode shift over time and to understand if the data indicates the role of parking in supporting the transition to sustainable transport. However, it was identified that there were too many variables and limitations between the 2009 and 2019 data to compare all transport questions together. Therefore, three separate reports have now been produced as follows:

- 2009 Household Surveys;
- 2019 Household Surveys; and
- 2009 and 2019 Household Survey Comparison (including limitations).

2 Introduction

2.1.1 The original purpose of the survey was to inform the 2021 Black Country Centres study and was conducted by NEMS market research company through telephone conversations. The survey data was used to assess the need for retail, office and commercial leisure development within the Black Country. Since this data was available and included transport-related data, the survey has been reviewed for the purposes of thie Black Country Parking Study. Some non-transportation related questions have been disregarded for the purpose of this study.

2.1.2 This 2019 household survey technical report provides a methodology and highlights any limitations within the survey and data. A high-level summary of findings has also been outlined within this technical note.

2.1.3 The survey included 6,000 participants over 55 postal zones, as shown in **Figure 2-1**.

Figure 2-1: 2019 Household Survey Zones

2.1.4 **Annex A** of this report provides a comprehensive breakdown of all the survey questions for 2019. The questions and answers relevant to car parking and transport have been analysed. It is noted that many of the questions were not analysed, due to the lack of data concerning the mode of travel or any relationships that could affect travel. Some questions were disregarded, including those about the frequency of use and the amount of spend. 31 questions were disregarded out of 46 (67%).

2.1.5 All of the questions that have been analysed can be found in **Annex B** within this report.

3 Limitations

3.1.1 There are several limitations to this survey data due to the survey not being explicitly produced for understanding transport or parking related matters. Therefore, this analysis should be considered for general trends only and provides a snapshot in time.

3.1.2 One fundamental limitation is that the zones, as shown in **Figure 2-1,** do not align with the local authority boundaries. Therefore, a 'best fit' methodology of the zones for the Black Country has been applied. This means that some boundaries overlap and the majority area has been used where this occurs. It should be noted that no double counting has occurred.

3.1.3 As previously mentioned, not all questions related to transport and most questions did not ask about the modal choice of specific shopping destinations.

3.1.4 Furthermore, questions that attribute 'free parking' preference or similar do not relate to specific retail sites. Therefore, the transport provision at specific retail locations cannot be attributed.

3.1.5 Based upon the above limitations, only a high-level analysis has been conducted. These results should only be used to identify general trends and not be used to analyse the outputs statistically.

3.1.6 Additionally, there were some limitations found concerning participants' characteristics, the main one being that many of the participants were aged 65+ and retired and fewer people were aged 18 to 24. Therefore, there may be differences in mode use and choice of location for shopping. For instance, there could be changes due to public transport discounts available for participants aged 65+ and they may be less likely to walk longer distances. Additionally, no question was asked about the participant's typical walking distance or disability, which could impact the use of active travel modes.

4 2019 Household Survey Analysis

4.1 Location of Households' Main Food Shopping Locations

Question One

Where do you normally shop for all your household's main food and grocery shopping needs (i.e. primarily bulk trolley purchases)? Excl. Nulls & SFT

4.1.1 **Table 4-1** shows the main food shopping locations with conditional colour formatting being applied to each local authority column, with **Red** = highest percentage, **Amber** = mid-range percentage, and **Green** = lowest percentage.

4.1.2 Most of the shopping is done within the Tier 1 centres, although these are widely distributed across all local authority areas, meaning that they are unlikely to travel as far to shop and stay within their local areas. This could be a result of the type of shopping destination available within their local areas.

Table 4-1: Household Main Food Shopping Location

		Dudley MBC	Sandwell MBC	Walsall MBC	CoW	Outside LA Areas
Dudley MBC	Brierley Hill	9%	1%	0%	0%	0%
	Dudley	29%	8%	0%	2%	1%
	Halesowen	13%	5%	0%	0%	3%
	Stourbridge	4%	0%	0%	9%	0%
Sandwell MBC	West Bromwich	1%	12%	0%	0%	0%
	Bearwood	0%	2%	0%	0%	0%
	Blackheath	2%	0%	0%	3%	4%
	Cape Hill	0%	9%	0%	0%	1%
	Cradley Heath	5%	10%	0%	0%	0%
	Great Bridge	2%	13%	0%	1%	0%
	Oldbury	1%	17%	0%	0%	1%
	Wednesbury	0%	8%	1%	1%	0%
Walsall MBC	Walsall	0%	0%	19%	0%	0%
	Aldridge	0%	0%	12%	0%	0%
	Bloxwich	0%	0%	8%	2%	0%
	Brownhills	0%	0%	15%	0%	0%
	Darlaston	0%	0%	2%	3%	0%
	Willenhall	0%	0%	12%	9%	0%
CoW	Wolverhampton	1%	0%	0%	23%	2%
	Bilston	1%	0%	1%	13%	0%
	Wednesfield	0%	0%	3%	14%	0%
Internet / delivery		6%	6%	10%	10%	11%
Other including outside of BC area		26%	7%	16%	11%	75%

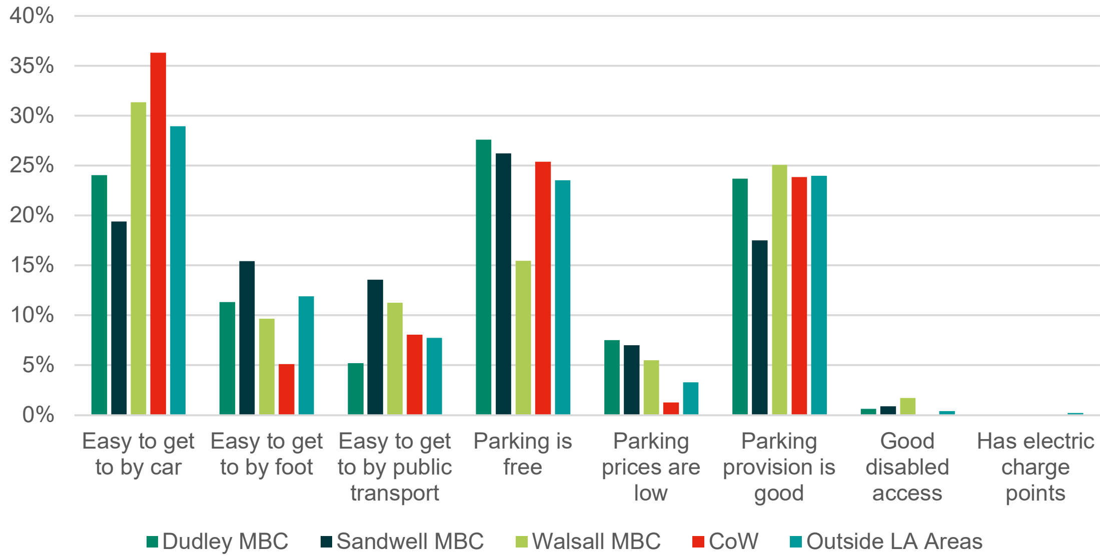
4.2 Transport Related ‘Likes’ About the Main Food Shopping Locations

Question Three

What do you like about (LOCATION MENTIONED AT Q01)? [MR] Not those who do their main food shopping via the internet at Q01

4.2.1 **Figure 4-1** shows the transport related likes for the main food shopping destination. It shows on average the top three likes were “easy to get to by car” at 28%, “free parking” at 24% and “good parking provision” at 23%. Some of the categories did vary between local authorities, which could indicate different levels of existing transport provision.

Figure 4-1: Likes About Main Food Shopping Destination



4.5 Mode of Travel to Main Food Shopping Destination

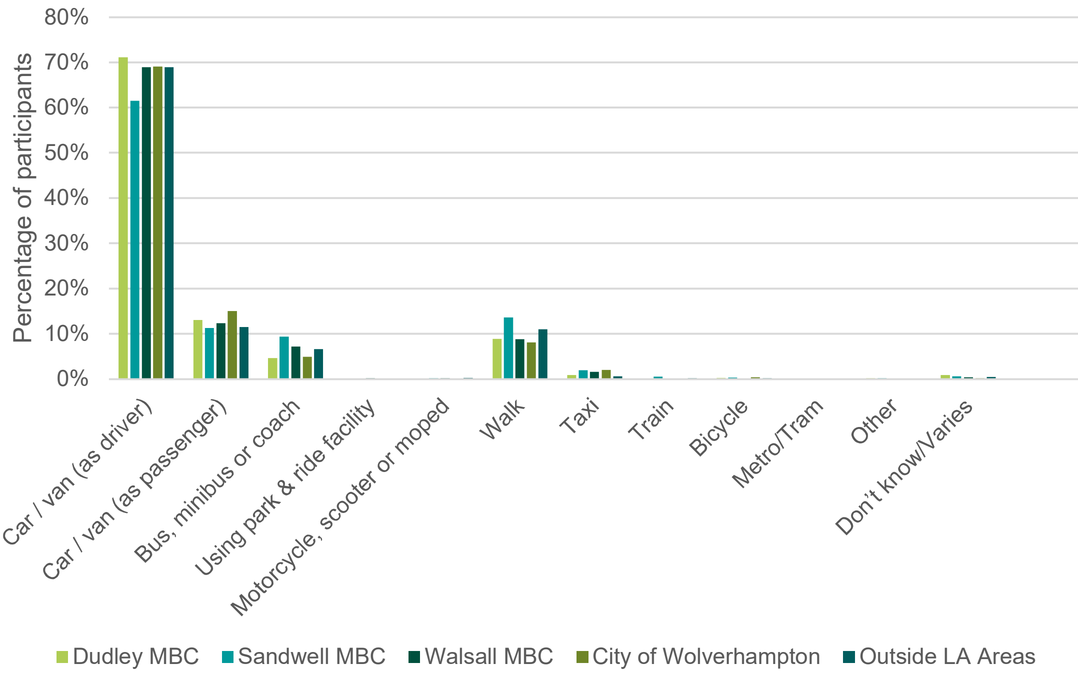
Question Four

What do you like about (LOCATION MENTIONED AT Q01)? [MR] Not those who do their main food shopping via the internet at Q01

4.2.2 **Figure 4-2** shows the modal split of participants for travel to their main food shop destination. Note that participants who selected the internet for the location of shopping have been disregarded from this question.

4.2.3 The analysis shows that the majority of participants complete their main food shopping by car as a driver or passenger, with Dudley, Walsall, and Wolverhampton having similar levels of car use ranging from 80% to 84%. Sandwell has the lowest car use at 73% and has the higher bus (4%) and walking (14%) proportions. All other mode use is considered to be insignificant, including the use of park and ride and the train.

Figure 4-2: Modal Split to Main Food Shopping Destination



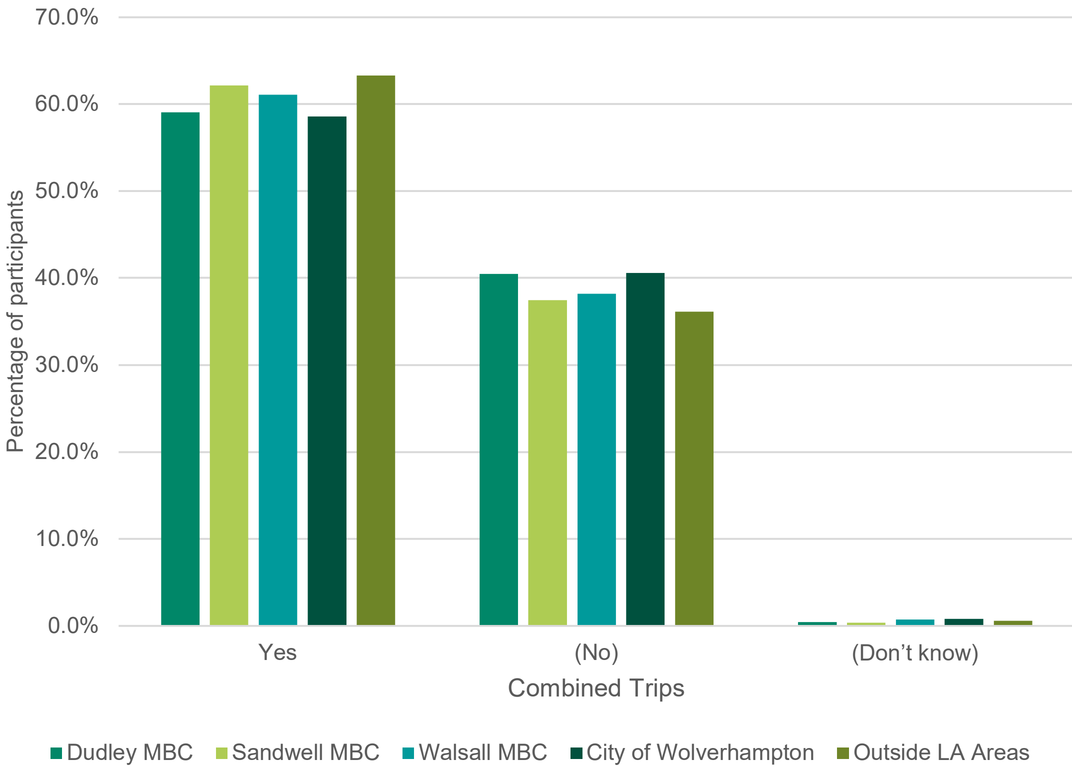
4.3 Combined Trips

Question Five

When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example, non-food shopping, leisure/entertainment activities, restaurants, bars, banks, etc.? Those who used a shop or shopping centre (not including internet / delivered) at Q01'.

4.3.1 Question 5 has been analysed to understand how participants combine their main food shop trip with other activities, such as meeting friends and family, buying fuel, and visiting other shops. The results are shown in **Figure 4-3.**

Figure 4-3: Combined Trips for Main Food Shop and Other Activities



4.3.2 The analysis shows that, in all areas, food shopping is generally combined with other activities, with the percentage ranging from 59% to 63% across the local authorities. Therefore, in all areas it is considered that there are similar levels, meaning that people tend to travel elsewhere before or after completing their main food shopping.

4.4 Closest Town Centre

Question 15

Which town or city centre is closest to you? Excl. Nulls & SFT

4.4.1 **Table 4-2** shows the closest town or city to the participants that were surveyed. It does show that the nearest town or city to some participants who live outside the local authority areas is within the Black Country. This is likely due to the difference within the zones being based upon postal areas and not matching the local authority areas.

Table 4-2: Closest Town or City to the Participants

		Participant Locations				
		Dudley MBC	Sandwell MBC	Walsall MBC	CoW	Outside LA Areas
Dudley MBC	Brierley Hill	8%	1%	0%	0%	0%
	Dudley	35%	13%	0%	1%	0%
	Halesowen	14%	3%	0%	0%	2%
	Stourbridge	18%	0%	0%	0%	3%
Sandwell MBC	West Bromwich	0%	25%	0%	0%	1%
	Bearwood	0%	1%	0%	0%	0%
	Blackheath	3%	6%	0%	0%	0%

	Cape Hill	0%	0%	0%	0%	0%
	Cradley Heath	2%	8%	0%	0%	0%
	Great Bridge	0%	1%	0%	0%	0%
	Oldbury	0%	13%	0%	0%	0%
	Wednesbury	0%	2%	0%	0%	0%
Walsall MBC	Walsall	0%	1%	48%	2%	1%
	Aldridge	0%	0%	2%	0%	0%
	Bloxwich	0%	0%	6%	0%	0%
	Brownhills	0%	0%	6%	0%	1%
	Darlaston	0%	0%	0%	0%	0%
	Willenhall	0%	0%	11%	3%	0%
CoW	Wolverhampton	4%	1%	4%	76%	11%
	Bilston	1%	0%	1%	11%	0%
	Wednesfield	0%	0%	0%	4%	0%
Other		14%	26%	21%	3%	81%

4.4.2 Additionally, this analysis shows that many of the nearest towns or cities are Teir One centres.

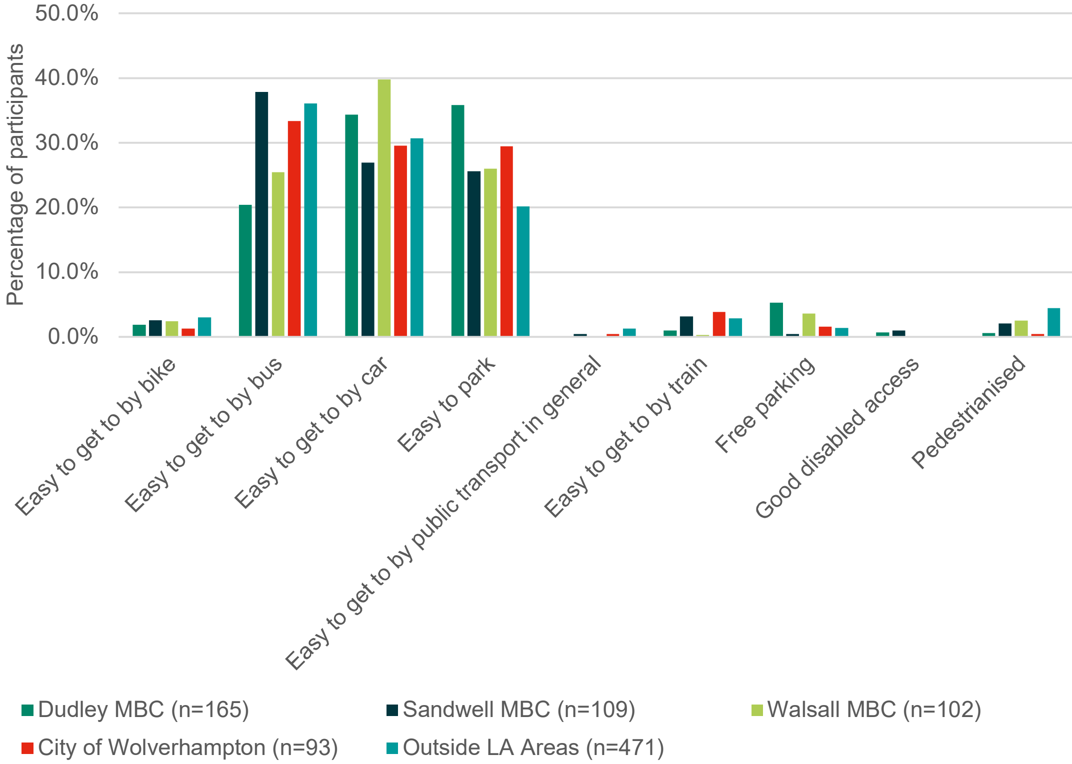
4.5 'Likes' About Nearest Town or City Centre

Question 18

What do you like about (CENTRE MENTIONED AT Q15) ? [MR] Not those who said 'Don't know' at Q15

4.5.1 **Figure 4-4** displays the transport-related elements that participants like about their nearest town or city centre. It shows that the top three are 'easy to get to by car', with an overall average of 32% across all local authority areas, 'easy to get the by bus' at 31%, and 'easy to park' at 27%. All other responses are considered to be significantly lower at 3% or less.

Figure 4-4: Likes About Nearest Town or City Centre



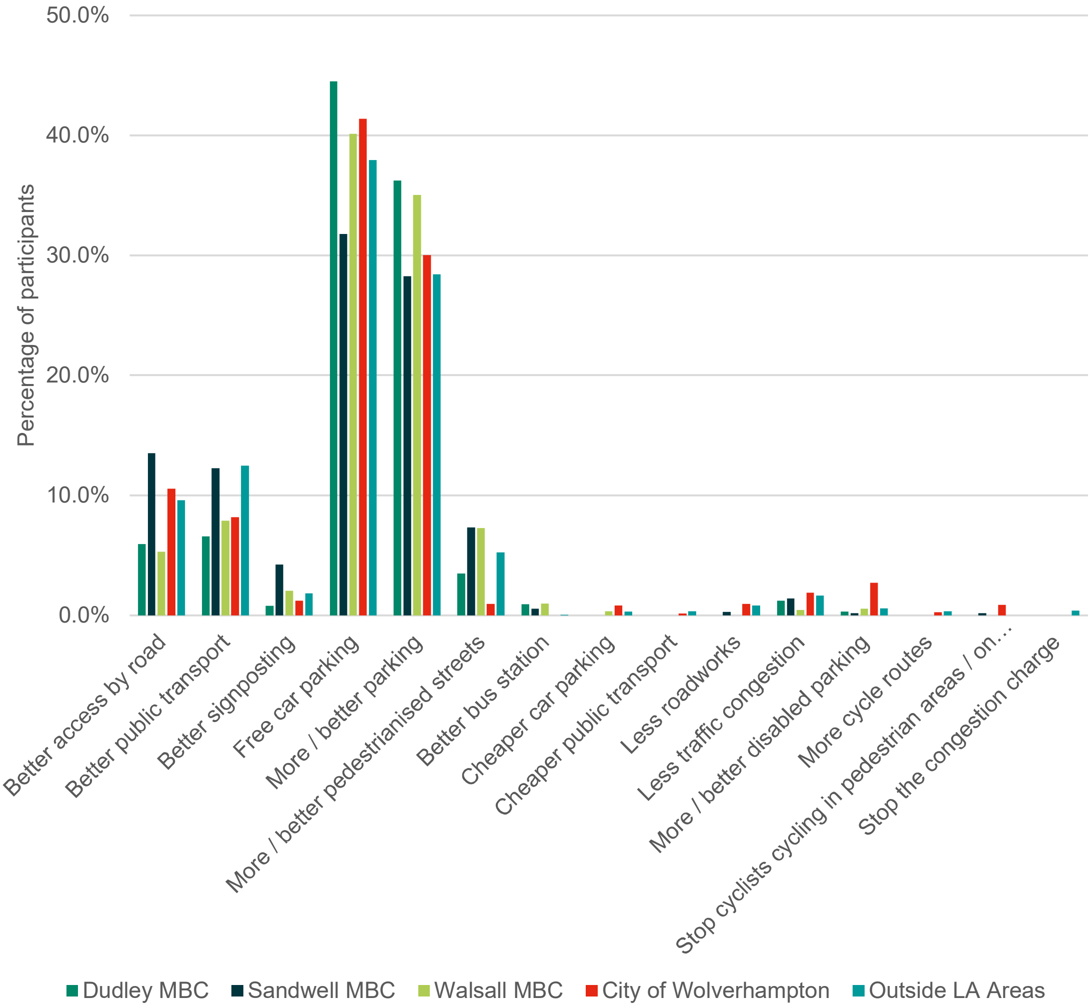
4.6 Dislikes About Nearest Town or City Centre

Question 19

What could be improved about (CENTRE MENTIONED AT Q15) that would make you visit it more often? [MR] Not those who said 'Don't know' at Q15

4.6.1 Many participants felt that free parking would improve their nearest town or city centre, with an average of 39% for all areas selecting this option. An average of 32% selected more/better parking, as shown in **Figure 4-5**. 9% selected 'better access by road' and 10% selected 'better access by public transport'. All other categories had 5% or less and are considered to be less significant.

Figure 4-5: Suggested Improvements to Nearest Town or City Centre

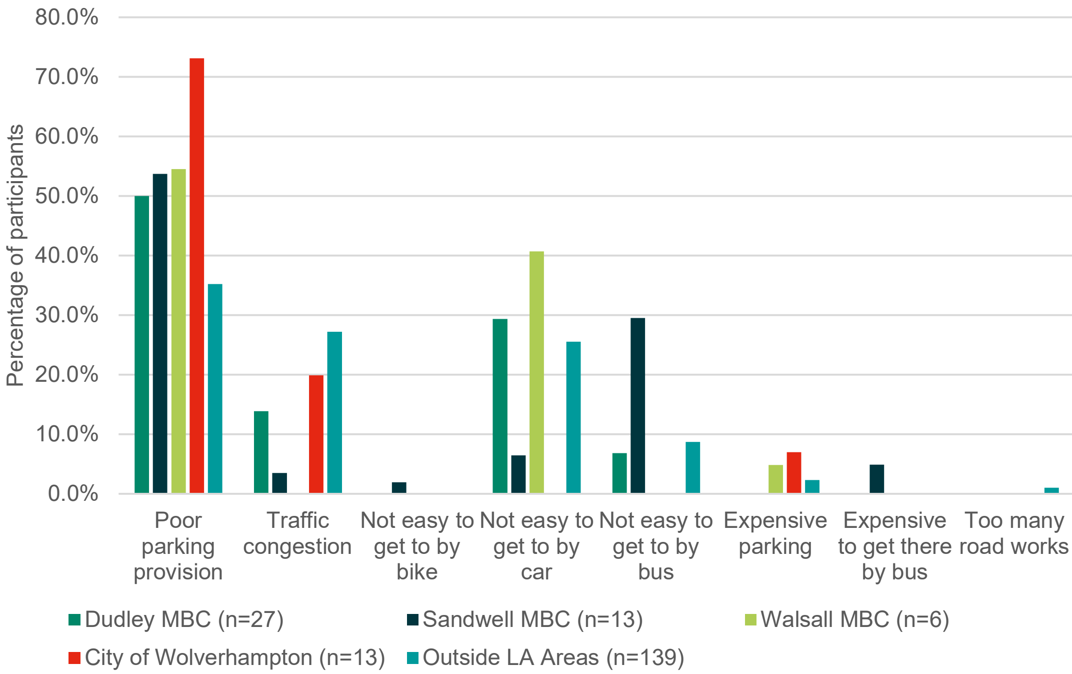


4.7 Reasons for Not Visiting Nearest Town or City Centre

Question 20
Why don't you visit (CENTRE MENTIONED AT Q15) for your household's shopping and town centre uses? [MR] Those who said 'Never' at Q16

4.7.1 Participants who stated that they never visited their nearest town or city were asked their reasons for this, as shown in **Figure 4-6.**

Figure 4-6: Reasons for Not Visiting Nearest Centre

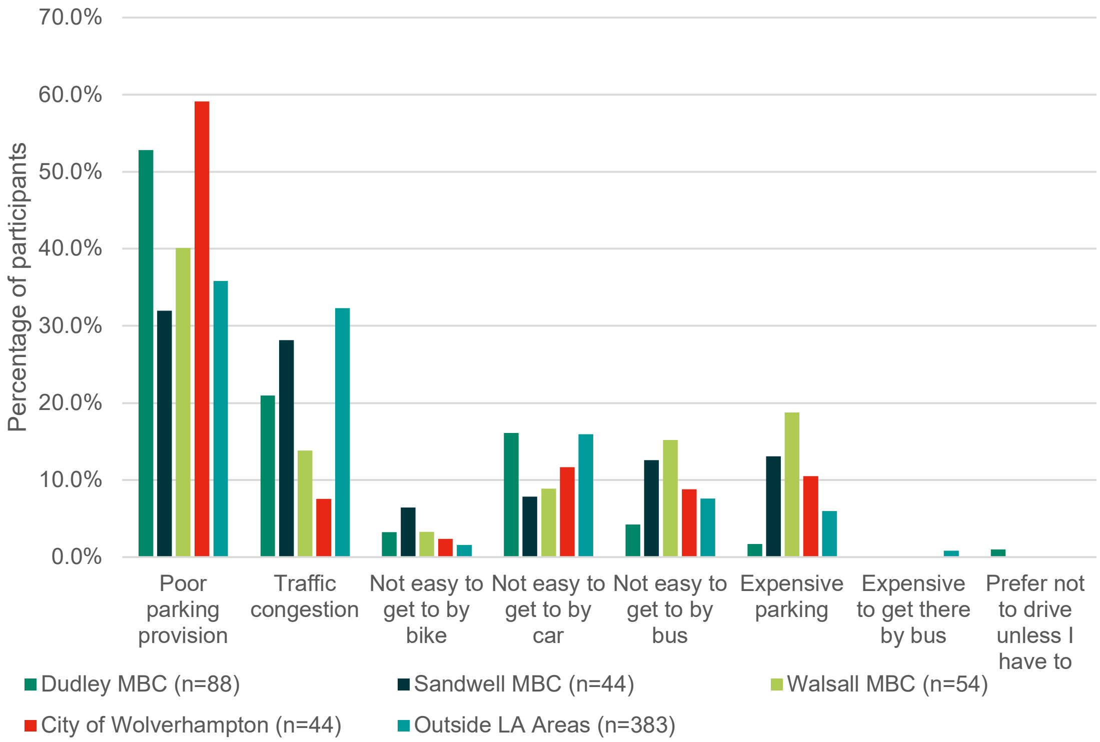


4.7.2 The results show that poor parking provision is the main reason for never visiting, with an average of 53% across all local authority areas. Wolverhampton has the most significant participation selection at 73%. The second most selected reason is 'not easy to get to by car', with an average of 20%. The main reasons link to poor accessibility by car.

Question 21
Why don't you visit (CENTRE MENTIONED AT Q15) for most of your household's shopping and town centre uses? [MR] Those who said 'No' at Q17

4.7.3 This question is similar to the previous question, but focuses on participants that responded "no" to Question 17 (*Do you use (CENTRE MENTIONED AT Q15) for most of your household's shopping and town centre uses?)*. The results are displayed in **Figure 4-7**. It shows similar reasons to those for the previous question, such as poor parking (average of 44%), traffic congestion (average of 21%) and being difficult to access by car (average of 12%). Wolverhampton also had the highest selection of poor parking provisions, which is similar to Question 20.

Figure 4-7: Reasons for Not Visiting the Household Shopping Centre



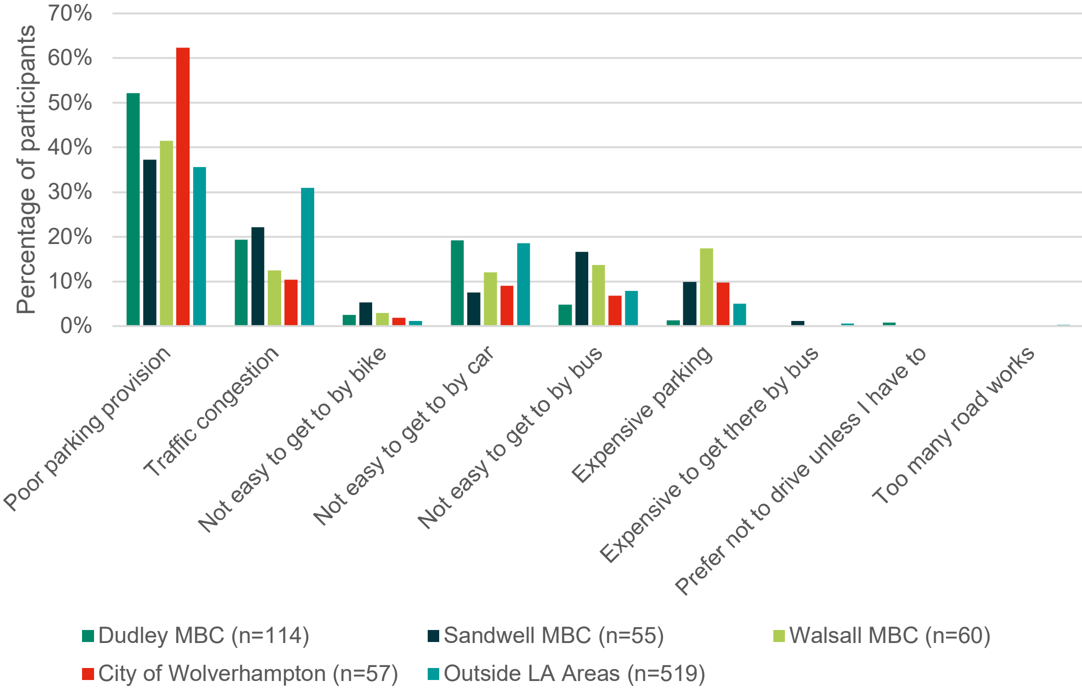
Question 21X

Why don't you visit (CENTRE MENTIONED AT Q15) for your household's shopping and town centre uses? (all respondents who don't visit) [MR] Those who said 'Never' at Q16 or 'No' at Q17

4.7.4 Question 21X is a combination of the response of participants choosing 'Never' to question 16, which stated *'How often do you visit (CENTRE MENTIONED AT Q15) for your household's shopping and other town centre uses? Not those who said 'Don't know' at Q15' and 'No' to question 17 which stated 'Do you use (CENTRE MENTIONED AT Q15) for most of your household's shopping and town centre uses? Not those who said 'Never' at Q16 or 'Don't know' at Q15'*. The results are displayed in **Figure 4-8.**

4.7.5 Similar to questions 19, 20 and 21, the analysis shows that poor parking provision was the main reason for not visiting a centre, with an average of 48% of participants across all areas never visiting their closest town centre or city for their household shopping and town centre uses. Other areas include traffic congestion, not being easy to get to by car and bus and expensive parking, all of which range from 10% to 16% across all areas.

Figure 4-8: Why Don't You Visit the Closest Town or City for Household Shopping and Town Centre Uses? Those Who Said 'Never' At Q16 Or 'No' At Q17



4.8 Location for Shopping for Men's, Women's, Children's And Baby Clothing And Footwear

Question 22
Where do you normally do most of your household's shopping for men's, women's, children's and baby clothing and footwear? NOTE we mean fashion items - NOT sports clothing and footwear Excl. Nulls & SFT

4.8.1 The results of Question 22 are shown in **Figure 4-9**. Similar to household shopping, most people shop for clothes primarily in the Teir One centres, within the local authority they live in. Brierley Hill, within the Dudley local authority, has the highest rate at 63%, which is likely due to Merry Hill shopping centre being located within this area.

Figure 4-9: Location of Shopping for Clothes

		Participant Locations				
		Dudley MBC	Sandwell MBC	Walsall MBC	CoW	Outside LA Areas
Dudley MBC	Brierley Hill	63%	29%	2%	10%	11%
	Dudley	5%	1%	0%	0%	0%
	Halesowen	2%	1%	0%	0%	0%
	Stourbridge	2%	0%	0%	0%	0%
Sandwell MBC	West Bromwich	1%	20%	1%	1%	1%
	Bearwood			-		
	Blackheath	1%	1%	0%	0%	0%
	Cape Hill			-		
	Cradley Heath	0%	0%	0%	0%	0%
	Great Bridge	0%	0%	0%	0%	0%

	Oldbury	0%	5%	0%	0%	0%
	Wednesbury	0%	1%	1%	0%	0%
Walsall MBC	Walsall	0%	1%	32%	4%	2%
	Aldridge			-		
	Bloxwich	0%	0%	1%	0%	0%
	Brownhills	0%	0%	1%	0%	0%
	Darlaston			-		
	Willenhall	0%	0%	0%	1%	0%
CoW	Wolverhampton	1%	1%	6%	33%	3%
	Bilston	0%	0%	1%	4%	0%
	Wednesfield	0%	0%	3%	12%	0%
Other		6%	17%	30%	11%	53%
Internet / delivery		17%	23%	22%	24%	28%

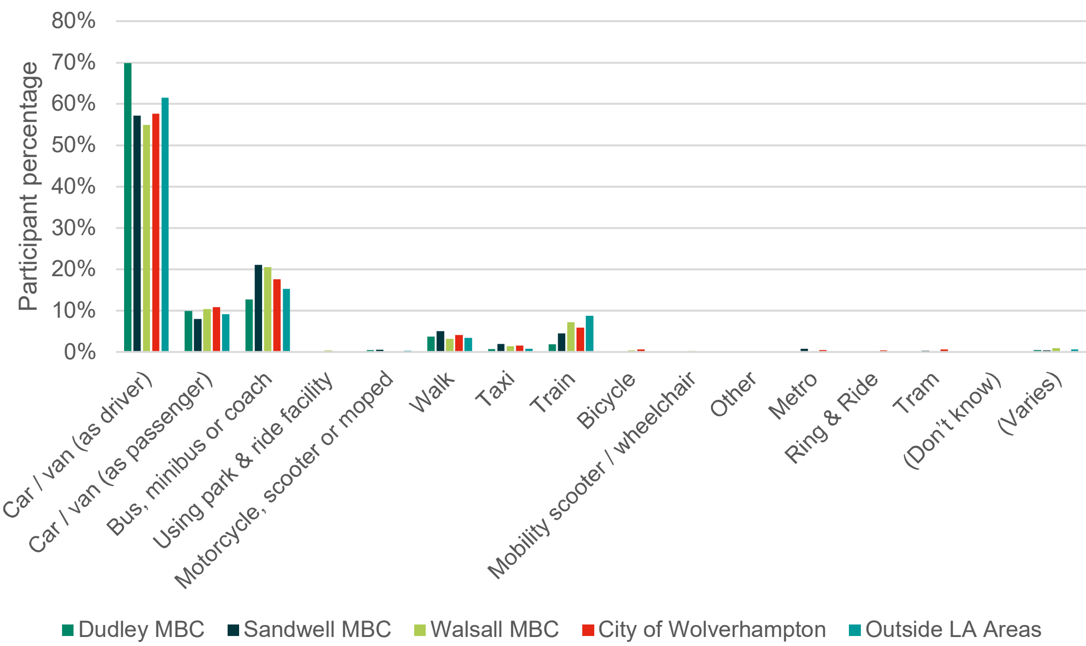
4.9 Mode of Travel for Shopping for Men's, Women's, Children's and Baby Clothing and Footwear

Question 23

How do you normally travel to (LOCATION MENTIONED AT Q22)? Not those who said 'Internet / delivery' or 'Abroad' or '(Don't know / varies)' or '(Don't do this type of shopping)' at Q22

4.9.1 The usual mode of travel to the clothes shopping destination has been analysed, which excludes those who answered 'Internet / delivery', 'abroad', 'don't know / varies' or 'don't do this type of shopping' within Question 22. The results are shown in **Figure 4-10**.

Figure 4-10: Mode of Travel to Clothes Shopping Destination Excluding 'Internet / Delivery', 'Abroad', 'Don't Know / Varies' or 'Don't do This Type of Shopping'



4.9.2 The results show that most people travel by car, with the highest car use in Dudley at 80%. Bus is the second most-used mode, with an average of 17% across all local authority areas, followed by train at 6% and walking at 4%. All other modes were considered insignificant at less than 2%. There are not considered to be any significant differences between areas.

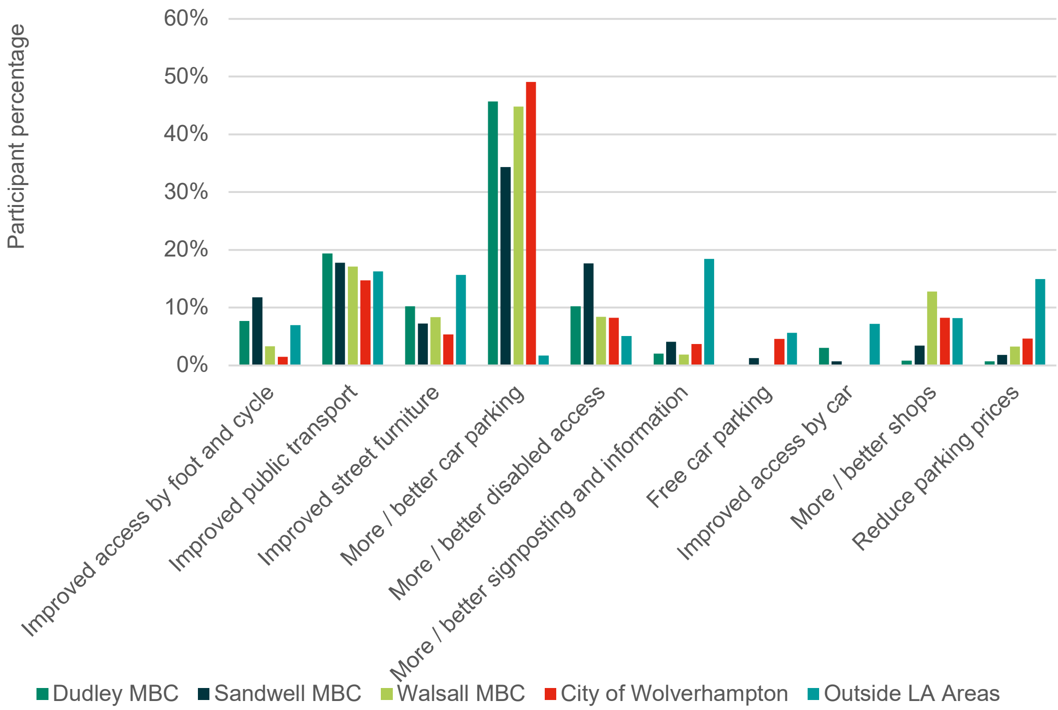
4.10 Improvements to the Leisure Offer

Question 42
What improvements could be made to the leisure offer in your Council area that would make you visit/partake in leisure activities more often? [MR]

4.10.1 **Figure 4-11** shows the transport-related improvements that participants suggest to the leisure offer within their council areas. It shows that more/better car parking is the main suggested improvement, with Wolverhampton having the highest response rate at 49%, with an overall average of 35%. Improved public transport has an overall average of 17%, with Dudley having the highest proportion at 19%.

4.10.2 Additionally, it shows that free parking and improved access by car were considered less important, as the overall area average was 2% and was the lowest across all other categories.

Figure 4-11: Improvements to be Made to Leisure Offer



4.11 2019 Survey Participation Charteristics

GEN *Gender of respondent*

4.11.1 Gender has been analysed to understand if there are even levels of gender participation across all areas, which is shown in **Table 4-3.**

Table 4-3: Gender of Respondents

		Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Gender	Male	35%	36%	38%	32%	36%
	Female	65%	64%	62%	68%	64%

4.11.2 In relation to participant characteristics, the majority of people were female, with a low range from 62% to 68% for all areas.

AGE *Could I ask how old you are?*

4.11.3 Age has been analysed and the results are depicted in **Table 4-4**. This has been used to understand the distribution across all areas since this could impact some of the results assessed, especially modal choice and destinations.

Table 4-4: Participant Age Distribution

		Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Age	18 to 24	8%	8%	8%	8%	7%
	25 to 34	14%	15%	17%	13%	12%
	35 to 44	18%	16%	19%	17%	17%
	45 to 54	17%	20%	19%	17%	17%
	55 to 64	18%	16%	16%	17%	19%
	65 +	26%	23%	22%	29%	28%
	(Refused)	0%	0%	0%	0%	0%

4.11.4 A large proportion of the participants that took part were aged 65+ across all areas. Nonetheless, the general age of the participants was between 25 and 65+. No significant differences in the age of the participants were identified based on the areas where they live.

EMP *Which of the following best describes the chief wage earner of your household's current employment situation?*

4.11.5 The survey asked for the status of the household's chief wage earner. The results are shown in **Table 4-5**.

Table 4-5: Chief Wage Earner

		Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Chief wage earner	Working full time	44%	44%	48%	41%	43%
	Working part time	10%	12%	8%	9%	9%
	Unemployed	4%	3%	5%	5%	4%
	Retired	29%	27%	25%	33%	32%
	A housewife	2%	3%	2%	4%	2%

A student	1%	0%	1%	1%	0%
Other including self employed, sick/disabled, carer	6%	6%	6%	4%	5%
(Refused)	4%	5%	5%	3%	5%

4.11.6 In relation to the chief wage earner, an average of 44% of all participants were working full time and 20% were self-employed. In all types of wage earner categories, there were no significant differences in trends, as all categories were below 10% difference between areas.

CAR *How many cars does your household own or have the use of?*

4.11.7 Car ownership was also assessed, which is an important consideration when determining the modal shift of participants. The findings of this are shown in **Table 4-6**.

Table 4-6: Car Ownership

		Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Cars household own or have use of	None	14%	12%	21%	18%	14%
	One	42%	41%	43%	37%	41%
	Two	29%	29%	24%	33%	27%
	Three or more	12%	14%	8%	11%	13%
	(Refused)	3%	4%	4%	2%	5%

4.11.8 The majority of participants owned at least one car and this is relatively consistent across all local authority areas. Walsall has the highest rate of non-car ownership at 21%, compared to Wolverhampton which has 18%.

Annex A – 2019 Household Survey Questions

Table A.1. All 2019 Questions Asked

	2019 Question	Analysed
Q01	Where do you normally shop for all your household's main food and grocery shopping needs (i.e. primarily bulk trolley purchases)? Excl. Nulls & SFT	Yes
Q02	Which retailer do you purchase your main food internet / home delivery shopping from? Those who do their main food shopping via the internet at Q01	No
Q03	What do you like about (LOCATION MENTIONED AT Q01)? [MR] Not those who do their main food shopping via the internet at Q01	Particle parking and transport related responses
Q04	How do you normally travel to (LOCATION MENTIONED AT Q01)? Not those who do their main food shopping via the internet at Q01	Yes
Q05	When you visit (LOCATION MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)? [MR]Not those who do their main food shopping via the internet at Q01	Yes, linked trips
Q06	When you combine your trip with other activities, where do you normally go? Those who combine their main food shopping trip with other activities at Q05 AND Excl. Nulls & SFT	No
Q07	In addition to (LOCATION MENTIONED AT Q01), is there anywhere else you regularly use for your main-food shopping? Excl. Nulls & SFT	No
Q08	Which internet / home delivery retailer do you use? Those who do their main food shopping via the internet at Q07	No
Q09	How much does your household normally spend on main food shopping in a week?	No
Q10	In addition to your main food shopping, where do you normally do most of your household's small scale top-up food shopping (i.e. the store you visit regularly (2+ times a week) to buy bread, milk, etc., on a day-to-day basis)? Excl. Nulls & SFT	No
Q11	Which internet / home delivery retailer do you use? Those who do their top-up shopping via the internet at Q10	No
Q12	In addition to (LOCATION MENTIONED AT Q10), is there anywhere else you regularly use for your household's small scale top-up food shopping? Those who do top-up shopping at Q10 AND Excl. Nulls & SFT	No
Q13	Which internet / home delivery retailer do you use? Those who do their top-up shopping via the internet at Q12	No

	2019 Question	Analysed
Q14	How much does your household normally spend on top-up shopping in a week? Those who do top-up shopping at Q10	No
Q15	Which town or city centre is closest to you? Excl. Nulls & SFT	Yes
Q16	How often do you visit (CENTRE MENTIONED AT Q15) for your household's shopping and other town centre uses? Not those who said 'Don't know' at Q15	No
Q17	Do you use (CENTRE MENTIONED AT Q15) for most of your household's shopping and town centre uses? Not those who said 'Never' at Q16 or 'Don't know' at Q15	Yes
Q18	What do you like about (CENTRE MENTIONED AT Q15) ? [MR] Not those who said 'Don't know' at Q15	Particle parking and transport related responses
Q19	What could be improved about (CENTRE MENTIONED AT Q15) that would make you visit it more often? [MR] Not those who said 'Don't know' at Q15	Particle parking and transport related responses
Q20	Why don't you visit (CENTRE MENTIONED AT Q15) for your household's shopping and town centre uses? [MR] Those who said 'Never' at Q16	Particle parking and transport related responses
Q21	Why don't you visit (CENTRE MENTIONED AT Q15) for most of your household's shopping and town centre uses? [MR] Those who said 'No' at Q17	Particle parking and transport related responses
Q21X	Why don't you visit (CENTRE MENTIONED AT Q15) for your household's shopping and town centre uses? (all respondents who don't visit) [MR] Those who said 'Never' at Q16 or 'No' at Q17	Particle parking and transport related responses
Q22	Where do you normally do most of your household's shopping for men's, women's, children's and baby clothing and footwear? NOTE we mean fashion items - NOT sports clothing and footwear Excl. Nulls & SFT	Yes
Q23	How do you normally travel to (LOCATION MENTIONED AT Q22)? Not those who said 'Internet / delivery' or 'Abroad' or '(Don't know / varies)' or '(Don't do this type of shopping)' at Q22	Yes
Q24	Where do you normally do most of your household's shopping for CDs, vinyl, DVDs, Blurays, etc.) (Excluding gaming)? Excl. Nulls & SFT	No
Q25	Where do you normally do most of your household’s shopping for audio visual, photographic, computer items (such as TVs, cameras, ipads, telephones etc) and all other domestic electrical goods (such as irons, kettles, fridges, freezers, dishwashers etc)? Excl. Nulls & SFT	No
Q26	Where do you normally do most of your household's shopping for books (incl. encyclopaedias, text books, guidebooks and musical scores) and stationery (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials? Excl. Nulls & SFT	No

2019

	Question	Analysed
Q27	Where do you normally do most of your household’s shopping for games & toys; pets and pet products; hobby items; sport clothing / footwear and equipment; camping goods; bicycles; and musical instruments? Excl. Nulls & SFT	No
Q28	Where do you normally do most of your household's shopping for furniture, carpets, other floor coverings and household textiles (includes beds, sofas, tables, etc)? Excl. Nulls & SFT	No
Q29	Where do you normally do most of your household's shopping for DIY goods, decorating supplies and garden products (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc)? Excl. Nulls & SFT	No
Q30	Where do you normally do most of your household’s shopping on all goods for personal care (including, electric razors, hair dryers, bathroom scales, cosmetics, perfume, toothpaste, etc), other medical and pharmaceutical products (e.g. vitamins, plasters) and therapeutic appliances (e.g. spectacles, hearing aids, wheelchairs, contact lenses etc)? Excl. Nulls & SFT	No
Q31	Where do you normally do most of your household's shopping on all other goods including jewellery & watches; glassware, china, tableware and household utensils; and other personal effects (e.g. travel goods, suitcases, prams, sunglasses)? Excl. Nulls & SFT	No
Q32	Do you or your household visit the following leisure attractions? [MR/PR]	No
Q33	Where do you or members of your household normally go to play bingo or visit casinos or bookmakers? Those that said 'Bingo / casino / bookmaker' at Q32 AND Excl. Nulls & SFT	No
Q34	Where do you or members of your household normally go to the cinema? Those that said 'Cinema' at Q32 AND Excl. Nulls & SFT	No
Q35	Where do you or members of your household normally go to use a gym / healthclub / sports facility? Those that said 'Gym / health club / sports facility' at Q32 AND Excl. Nulls & SFT	No
Q36	Where do you or members of your household normally go to visit the theatre, watch a concert or watch live music? Those that said 'Theatre / concert / music venue' at Q32 AND Excl. Nulls & SFT	No
Q37	Where do you or members of your household normally go to a museum, gallery, or other place of historical / cultural interest? Those that said 'Museum / gallery or place of historical / cultural interest' at Q32 AND Excl. Nulls & SFT	No
Q38	What location (e.g. town centre, shopping centre, retail/ leisure park) do you or members of your household normally go to when visiting pubs / bars / nightclubs? Those that said 'Pub / bar / nightclub' at Q32 AND Excl. Nulls & SFT	No
Q39	What location (e.g. town centre, shopping centre, retail/ leisure park) do you or members of your household normally go to for eating out (e.g. cafes and restaurants)? Those that said 'Restaurant / café / eating out' at Q32 AND Excl. Nulls & SFT	No
Q40	Where do you or members of your household normally go for family entertainment? Those that said 'Family entertainment (e.g. tenpin bowling, skating rink)' at Q32 AND Excl. Nulls & SFT	No

2019

	Question	Analysed
Q41	Where do you or members of your household normally go for (OTHER ACTIVITY FROM Q32)? Those that said 'Cycling', 'Fishing', 'Horse riding', 'Place of worship / religious meeting' or 'Walking' at Q32 AND Excl. Nulls & SFT	No
Q42	What improvements could be made to the leisure offer in your Council area that would make you visit / partake in leisure activities more often? [MR]	Particle parking and transport related responses
GEN	Gender of respondent:	Yes
AGE	Can I ask how old you are please?	Yes
CAR	How many cars does your household own or have the use of?	Yes
EMP	Which of the following best describes the chief wage earner of your household's current employment situation? [PR]	Yes

Source: 2009 and 2019 Household Surveys

Annex B - 2019 Questions Analysed

	2019
Q01	Where do you normally shop for all your household’s main food and grocery shopping needs (i.e. primarily bulk trolley purchases)? Excl. Nulls & SFT
Q03	What do you like about (LOCATION MENTIONED AT Q01)? [MR] Not those who do their main food shopping via the internet at Q01
Q04	How do you normally travel to (LOCATION MENTIONED AT Q01)? Not those who do their main food shopping via the internet at Q01
Q05	When you visit (LOCATION MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)? [MR]Not those who do their main food shopping via the internet at Q01
Q07	In addition to (LOCATION MENTIONED AT Q01), is there anywhere else you regularly use for your main-food shopping? Excl. Nulls & SFT
Q08	Which internet / home delivery retailer do you use? Those who do their main food shopping via the internet at Q07
Q09	How much does your household normally spend on main food shopping in a week?
Q10	In addition to your main food shopping, where do you normally do most of your household's small scale top-up food shopping (i.e. the store you visit regularly (2+ times a week) to buy bread, milk, etc., on a day-to-day basis)? Excl. Nulls & SFT
Q18	What do you like about (CENTRE MENTIONED AT Q15) ? [MR] Not those who said 'Don't know' at Q15
Q19	What could be improved about (CENTRE MENTIONED AT Q15) that would make you visit it more often? [MR] Not those who said 'Don't know' at Q15
Q20	Why don't you visit (CENTRE MENTIONED AT Q15) for your household's shopping and town centre uses? [MR] Those who said 'Never' at Q16
Q21	Why don't you visit (CENTRE MENTIONED AT Q15) for most of your household's shopping and town centre uses? [MR] Those who said 'No' at Q17
Q21X	Why don't you visit (CENTRE MENTIONED AT Q15) for your household's shopping and town centre uses? (all respondents who don't visit) [MR] Those who said 'Never' at Q16 or 'No' at Q17
Q22	Where do you normally do most of your household's shopping for men's, women's, children's and baby clothing and footwear? NOTE we mean fashion items - NOT sports clothing and footwear Excl. Nulls & SFT
Q23	How do you normally travel to (LOCATION MENTIONED AT Q22)? Not those who said 'Internet / delivery' or 'Abroad' or '(Don't know / varies)' or '(Don't do this type of shopping)' at Q22
Q42	What improvements could be made to the leisure offer in your Council area that would make you visit / partake in leisure activities more often? [MR]
GEN	Gender of respondent:
AGE	Can I ask how old you are please?
CAR	How many cars does your household own or have the use of?
EMP	Which of the following best describes the chief wage earner of your household's current employment situation? [PR]

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Appendix C – Comparison of 2009 and 2019 Household Surveys

Appendix C: Black Country Parking Study

Task 2b: Household Surveys 2009 and 2019 Comparison

Sandwell Metropolitan Borough Council

August 2022

Delivering a better world

Quality information

Prepared by	Checked by	Verified by	Approved by
[redacted]			

Revision History

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1 Background

1.1.1 AECOM has been commissioned to undertake a study on car parking in Black Country Tier 1 and 2 centres to support the development of a justified policy approach towards car parking in Black Country strategic centres to inform the preparation of the Black Country Plan and guide decision making with regards to relevant individual proposals. The Plan will consider and direct development beyond the current plan period from 2026 up to 2038. This study has been divided into two stages: Stage 1 and Stage 2.

1.1.2 This Household Survey 2009 and 2019 Comparison technical note has been produced to support Task 2b: Information and Evidence within the Stage 2 report. The original scope of Task 2 was to provide a high-level comparison between the 2009 and 2019 Household Surveys to provide additional data on parking patterns across the respective centres and changes in mode shift over time and to understand if the data provides additional insight into the role of parking in supporting the transition to more sustainable transport. However, it was identified that there were too many variables and limitations between the 2009 and 2019 data to compare all transport questions together. Therefore, three separate reports have now been produced as follows:

- 2009 Household Surveys;
- 2019 Household Surveys; and
- 2009 and 2019 Household Survey Comparison (including limitations).

2 Introduction

2.1.1 The Household Surveys were commissioned by the Black Country Authorities to inform the Centres Policies in the 2011 Black Country Core Strategy and the 2021 Draft Black Country Plan respectively. The surveys offer some transport and travel mode data and analysis of these aspects of the data sets has been undertaken to understand if there is any indication of changes in travel mode or car parking trends over the 10-year period that can inform transport policies.

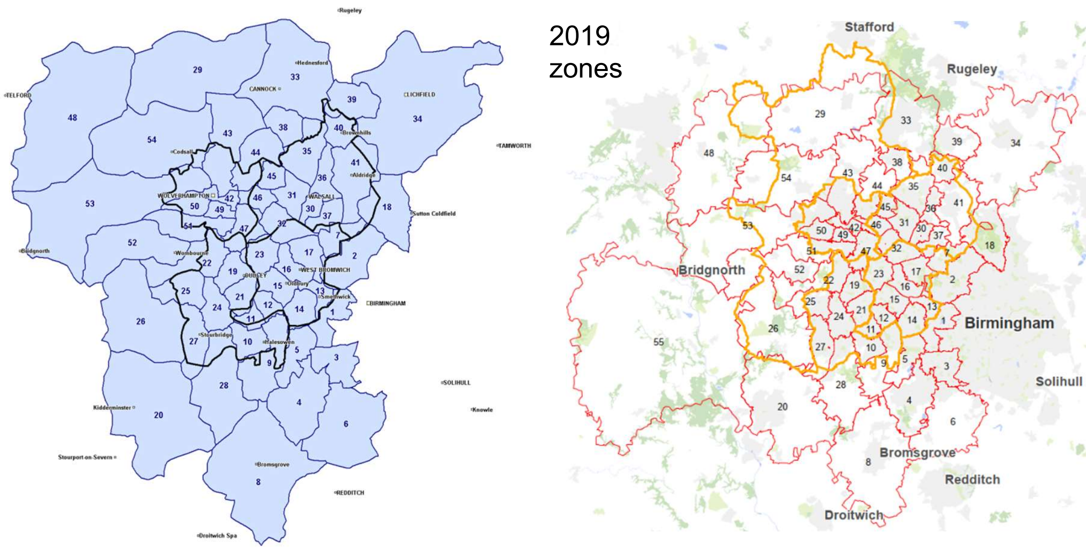
2.1.2 This Household Survey 2009 and 2019 Comparison technical report outlines the methodology used to analyse the data and highlights the limitations of using the data for this purpose. A summary of findings is included.

2.1.3 It is noted that both 2009 and 2019 surveys were conducted by telephone. The 2009 surveys included 4,500 households over 54 zones, compared with 2019, which surveyed 6,000 over 55 zones. The additional zone (Zone 55) covers Shropshire. The survey areas for the two surveys are illustrated in **Figure 2-1**.

Figure 2-1: 2009 and 2019 Household Survey Zones

2009 zones

2019 zones



2.1.4 **Annex A** of this report sets out a complete list of the survey questions for 2009 and 2019. As noted in 2.1.1, only those questions relevant to car parking and transport / travel mode have been analysed. Those questions that did not contain mode of travel or other transport factors were disregarded and not analysed. From the 2009 surveys, 12 out of 28 questions (42%) were disregarded and 31 out of 46 (67%) from the 2019 surveys.

2.1.5 All of the questions that have been analysed can be found in **Annex B** within this report.

2.1.6 Of the questions analysed, a comparison between 2009 and 2019 Household Surveys can only be made for seven questions. Also, these comparisons can only be made at a high level due to slight variations in the wording of the questions and nature of the answers provided. **Table 2-1** lists those questions where it is felt comparisons are appropriate to be made.

Table 2-1: Direct Comparison Between 2009 and 2019 Household Surveys

2009 Questions	2009 Comparable to 2019	2019 Related Questions	2019 Questions	2019 Comparable to 2019	2009 Related Questions
Q01	High level	Q01	Q01	High level	Q01
Q02	High level	Q04	Q04	High level	Q02
Q03	High level	Q05	Q05	High level	Q03
GEN	Yes	GEN	GEN	Yes	GEN
AGE	Yes	AGE	AGE	Yes	AGE
EMP	Yes	EMP	CAR	Yes	CAR
CAR	Yes	CAR	EMP	Yes	EMP

3 Limitations

3.1.1 As previously noted, there are limitations on the ability to analyse the survey data for transport and parking trends, which is understandable as the survey purpose was to consider retail shopping habits. Therefore, this analysis should be considered for general trends only.

3.1.2 One limitation is that the zones are based with post code areas, as shown in **Figure 2-1,** and do not align with the Local Authority boundaries. Therefore, a 'Best Fit' methodology of the zones for the Black Country has been applied. Where a postcode zone spans more than one Local Authority area, the zone has been allocated to the Local Authority within which the the majority of the postcode area falls. It should be noted that this method avoids double counting.

3.1.3 The 2019 Survey includes an additional zone (55) covering Shropshire that was not included in the 2009 survey. Also, in 2009 approximately 4,000 participants took part compared to about 6,000 in 2019. Therefore, where comparisons have been made a weighting has been applied to overcome the difference in sample size.

3.1.4 As previously mentioned, not all questions related to transport and most questions did not ask about the travel mode choice to locations. This limited the questions that could be analysed.

3.1.5 To overcome some of the differences between the questions asked between the 2009 and 2019 surveys a 'Best Fit' approach has been taken.

3.1.6 Where questions provided multiple answers, such as questions relating to likes, dislikes and improvements, only answers that related to parking or transport were analysed.

3.1.7 Many of the multiple choice questions that included transport elements in the answer preferences, such as 'free parking', do not relate to specific retail sites.

4 Comparision Survey Analysis

4.1 Comparability of Questions

4.1.1 **Table 4-1** and **Table 4-2** set out the seven comparable questions across the 2009 and 2019 surveys. These include three primary questions about household main food shopping trends and four survey participants' characteristics questions which have been analysed and weighted.

Table 4-1: 2009 and 2019 Comparitive Questions

Question	2009 Comparable to 2019	2019 Related question	Question	2019 Comparable to 2019	2009 Related question
Q01	High level	Q01	Q01	High level	Q01
Q02	High level	Q04	Q04	High level	Q02
Q03	High level	Q05	Q05	High level	Q03
GEN	Yes	GEN	GEN	Yes	GEN
AGE	Yes	AGE	AGE	Yes	AGE
EMP	Yes	EMP	CAR	Yes	CAR
CAR	Yes	CAR	EMP	Yes	EMP

Table 4-2: Outline Of Questions Analysed

2009 Question		2019 Question	
Q01	In which shop or shopping centre do you do most of your household's main food shopping ? (Not including don't do or internet / delivered at Q01)	Q01	Where do you normally shop for all your household's main food and grocery shopping needs (i.e. primarily bulk trolley purchases)? Excl. Nulls & SFT
Q02	How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?	Q04	How do you normally travel to (LOCATION MENTIONED AT Q01)? Not those who do their main food shopping via the internet at Q01
Q03	When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example non-food shopping, leisure / entertainment activities, restaurants, bars, banks, etc? Those who used a shop or shopping centre (not including internet / delivered) at Q01	Q05	When you visit (LOCATION MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)? [MR]Not those who do their main food shopping via the internet at Q01
GEN	Gender of respondent.	GEN	Gender of respondent.
AGE	Could I ask how old you are ?	AGE	Can I ask how old you are please?
EMP	Which of the following best describes the chief wage earner of your household's current employment situation ?	EMP	Which of the following best describes the chief wage earner of your household's current employment situation? [PR]
CAR	How many cars does your household own or have the use of ?	CAR	How many cars does your household own or have the use of?

4.2 Household Food Shop Location

Where do you normally shop for all your household's main food and grocery shopping needs (i.e. primarily bulk trolley purchases)? Excl. Nulls & SFT

4.2.1 **Table 4-3** shows the comparison between 2009 and 2019 households main food shopping location.

Table 4-3: 2019 Normal Shop Location For Main Food Shop

All Results shown in percentages (%)		2009 Main Food Shop					2019 Main Food Shop				
		Dudley MBC	Sandwell MBC	Walsall MBC	CoW	Outside LA Areas	Dudley MBC	Sandwell MBC	Walsall MBC	CoW	Outside LA Areas
Dudley MBC	Brierley Hill	31	1	0	0	1	9	1	0	0	0
	Dudley	15	4	5	5	6	29	8	0	2	1
	Halesowen	4	1	0	0	0	13	5	0	0	3
	Stourbridge	1	0	0	0	1	4	0	0	9	0
Sandwell MBC	West Bromwich	0	6	0	0	0	1	12	0	0	0
	Bearwood	0	0	0	0	0	0	2	0	0	0
	Blackheath	6	7	0	0	1	2	0	0	3	4
	Cape Hill	0	8	0	0	3	0	9	0	0	1
	Cradley Heath	0	0	0	0	1	5	10	0	0	0
	Great Bridge	0	0	0	0	0	2	13	0	1	0
	Oldbury	2	20	0	0	1	1	17	0	0	1
	Wednesbury	1	4	5	0	0	0	8	1	1	0
Walsall MBC	Walsall	2	8	28	4	0	0	0	19	0	0
	Aldridge	0	0	7	0	0	0	0	12	0	0
	Bloxwich	0	0	9	1	0	0	0	8	2	0
	Brownhills	0	0	0	0	0	0	0	15	0	0
	Darlaston	4	4	0	0	0	0	0	2	3	0
	Willenhall	0	0	2	0	0	0	0	12	9	0
CoW	Wolverhampton	2	0	1	41	6	1	0	0	23	2
	Bilston	1	2	2	17	0	1	0	1	13	0
	Wednesfield	0	0	2	12	0	0	0	3	14	0
Merry Hill including Merry Hill shopping centre		1	0	0	0	0	-	-	-	-	-
Don't know / varies		0	0	0	0	0	-	-	-	-	-
Other doesn not include internet/derlivery		0	0	1	0	0	-	-	-	-	-
Internet/derlivery		-	-	-	-	-	6	6	10	10	11
Outside BC strategic centers and Town centers		50	31	33	18	76	26	7	16	11	75

4.2.2 In terms of shopping locations, the principal difference is that the 2019 survey includes internet shopping which equates to an average of 9% across all areas. Additionally, in 2019, the main food shopping locations are distributed more widely across local authority areas, indicating that shoppers may shop more locally.

4.3 Household Travel To Main Food Shopping Destination

How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?

4.3.1 In relation to the travel mode, car use for the main food shop destination across all areas increased by approximately 2.4% since 2009. Bus travel had decreased overall by 6.6% since 2009.

4.4 Combined Shopping With Other Activities

When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example, non-food shopping, leisure/entertainment activities, restaurants, bars, banks, etc.? Those who used a shop or shopping centre (not including internet / delivered) at Q01'.

4.4.1 **Figure 4-1** shows a significant difference in linked trip patterns. In 2009 all local authorities had an average of 41% linked trips but this had increased to an average of 60% in 2019, an increase of 19%. Linked trips for people shopping outside of their local authority area is most prominent in both years, which is likely due to the distance of travel. However, the survey data is not available to substantiate this theory.

Figure 4-1: Combined Trips

4.5 Survey Participation Characteristics

GEN *Gender of respondent*

4.5.1 Gender comparisons between 2009 and 2019 is shown in **Table 4-4**. This shows that there were 6% more females participating in the survey in 2009 compared to 2019, but this is not considered to be significant.

Table 4-4: Gender

	2009					2019				
	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Male	26%	27%	29%	32%	28%	35%	36%	38%	32%	36%

Gender	Female	74%	73%	71%	68%	72%	65%	64%	62%	68%	64%

AGE *Could I ask how old you are?*

4.5.2 **Table 4-5** shows that in 2019 the majority range of participants was aged 25 to 65+ with 9% fewer participants aged 65+. However, in 2009 the average participant aged between 18 to 24 was 2% compared to 8% in 2019. Overall, the age distribution between 2009 and 2019 is similar.

Table 4-5: Age Distribution

	2009					2019				
	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
18 to 24	2%	2%	3%	3%	2%	8%	8%	8%	8%	7%
25 to 34	6%	8%	7%	7%	8%	14%	15%	17%	13%	12%
35 to 44	18%	17%	15%	14%	19%	18%	16%	19%	17%	17%
45 to 54	25%	19%	23%	22%	27%	17%	20%	19%	17%	17%
55 to 64	14%	16%	17%	15%	14%	18%	16%	16%	17%	19%
65 +	35%	37%	34%	38%	29%	26%	23%	22%	29%	28%
(Refused)	0%	1%	1%	1%	0%	0%	0%	0%	0%	0%

EMP *Which of the following best describes the chief wage earner of your household's current employment situation?*

4.5.3 Most participants were in full-time work or retired in both years, but there was an average increase of 3% in part-time workers surveyed in 2019, as shown in **Table 4-6**. It shows that similar levels of wage earner between both years were surveyed.

Table 4-6: Chief Wage Earner

	2009					2019				
	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
Working full time	48%	42%	47%	39%	50%	44%	44%	48%	41%	43%
Working part time	7%	7%	7%	7%	8%	10%	12%	8%	9%	9%
Unemployed	3%	5%	5%	7%	5%	4%	3%	5%	5%	4%
Retired	41%	44%	39%	42%	36%	29%	27%	25%	33%	32%
A housewife	0%	1%	1%	2%	1%	2%	3%	2%	4%	2%
A student	0%	0%	0%	1%	0%	1%	0%	1%	1%	0%
Other (including incapacity benefits)	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%
(Refused)	1%	1%	1%	2%	1%	1%	1%	1%	2%	1%

CAR *How many cars does your household own or have the use of?*

4.5.4 In terms of car ownership, the levels were similar, with less than 10 differences between 2009 and 2019, as shown in **Table 4-7**. It shows that most participants, in both years, owned at least one car within the household.

Table 4-7: Car Ownership Levels

	2009					2019				
	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas	Dudley MBC	Sandwell MBC	Walsall MBC	City of Wolverhampton	Outside LA Areas
None	14%	27%	18%	25%	17%	14%	12%	21%	18%	14%
One	45%	48%	44%	47%	42%	42%	41%	43%	37%	41%
Two	30%	19%	29%	20%	31%	29%	29%	24%	33%	27%
Three or more	9%	4%	8%	6%	9%	12%	14%	8%	11%	13%
(Refused)	1%	2%	1%	1%	1%	3%	4%	4%	2%	5%

Annex A – 2009 and 2019 Household Survey Questions

Table A-1. Comparison of 2009 and 2019 Questions

2009			2019		
	Question	Analysed		Question	Analysed
Q01	In which shop or shopping centre do you do most of your household's main food shopping ? (Not including don't do or internet / delivered at Q01)	Yes	Q01	Where do you normally shop for all your household's main food and grocery shopping needs (i.e. primarily bulk trolley purchases)? Excl. Nulls & SFT	Yes
Q02	How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?	Yes	Q02	Which retailer do you purchase your main food internet / home delivery shopping from? Those who do their main food shopping via the internet at Q01	No
Q03	When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example non-food shopping, leisure / entertainment activities, restaurants, bars, banks, etc? Those who used a shop or shopping centre (not including internet / delivered) at Q01	Yes, linked trips	Q03	What do you like about (LOCATION MENTIONED AT Q01)? [MR] Not those who do their main food shopping via the internet at Q01	Particle parking and transport related responses
Q04	Where do you do most of your household's small scale 'top-up' food shopping ? (i.e. to buy bread, milk, etc, on a day-to-day basis) (Not including don't do or internet / delivered at Q04)	No	Q04	How do you normally travel to (LOCATION MENTIONED AT Q01)? Not those who do their main food shopping via the internet at Q01	Yes
Q05	In which town centre, freestanding store or retail park do you do most of your household's shopping for clothing, footwear and other fashion goods? (Not including internet / catalogue / mail order / tv shopping, abroad or don't buy at Q05)	Yes	Q05	When you visit (LOCATION MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)? [MR]Not those who do their main food shopping via the internet at Q01	Yes, linked trips
Q06	How does your household normally travel to its main clothing and footwear shopping destination (LOCATION MENTIONED AT Q05)? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Yes	Q06	When you combine your trip with other activities, where do you normally go? Those who combine their main food shopping trip with other activities at Q05 AND Excl. Nulls & SFT	No
Q07	What do you like about the (LOCATION MENTIONED AT Q05) ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Particle parking and transport	Q07	In addition to (LOCATION MENTIONED AT Q01), is there anywhere else you regularly use for your main-food shopping? Excl. Nulls & SFT	No

2009			2019		
	Question	**Analysed**		**Question**	**Analysed**
		related responses			
Q08	What do you dislike about (LOCATION MENTIONED AT Q05) ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Particle parking and transport related responses	Q08	Which internet / home delivery retailer do you use? Those who do their main food shopping via the internet at Q07	No
Q09	What would make you shop in or visit (LOCATION MENTIONED AT Q05) more often ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Particle parking and transport related responses	Q09	How much does your household normally spend on main food shopping in a week?	No
Q10	How often do you visit (LOCATION MENTIONED AT Q05) in the evenings ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	No	Q10	In addition to your main food shopping, where do you normally do most of your household's small scale top-up food shopping (i.e. the store you visit regularly (2+ times a week) to buy bread, milk, etc., on a day-to-day basis)? Excl. Nulls & SFT	No
Q11	What would make you stay longer in (LOCATION MENTIONED AT Q05) to use it in the evenings? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Yes	Q11	Which internet / home delivery retailer do you use? Those who do their top-up shopping via the internet at Q10	No
Q12	Where do you do most of your households shopping for furniture, floor coverings and household textiles ? (Not including internet / catalogue / mail order / tv shopping or don't buy at Q12)	No	Q12	In addition to (LOCATION MENTIONED AT Q10), is there anywhere else you regularly use for your household's small scale top-up food shopping? Those who do top-up shopping at Q10 AND Excl. Nulls & SFT	No
Q13	Where do you do most of your households shopping for DIY and decorating goods ? (Not including internet / catalogue / mail order / tv shopping or don't buy at Q13)	No	Q13	Which internet / home delivery retailer do you use? Those who do their top-up shopping via the internet at Q12	No
Q14	Where do you do most of your households shopping for domestic appliances such as washing machines, fridges cookers and kettles ? (Not including internet / catalogue / mail order / tv shopping or don't buy at Q14)	No	Q14	How much does your household normally spend on top-up shopping in a week? Those who do top-up shopping at Q10	No
Q15	Where do you do most of your households shopping for TV, Hi-Fi, Radio, photographic and computer equipment ? (Not including	No	Q15	Which town or city centre is closest to you? Excl. Nulls & SFT	No

2009			2019		
	Question	Analysed		Question	Analysed
	internet / catalogue / mail order / tv shopping, abroad or don't buy at Q15)				
Q16	Where do you do most of your households shopping on personal / luxury goods including books, jewellery, china, glass and cosmetics ? (Not including internet / catalogue / mail order / tv shopping, abroad or don't buy at Q16)	No	Q16	How often do you visit (CENTRE MENTIONED AT Q15) for your household's shopping and other town centre uses? Not those who said 'Don't know' at Q15	No
Q17	Do you take part in any of the following leisure or cultural activities ?	No	Q17	Do you use (CENTRE MENTIONED AT Q15) for most of your household's shopping and town centre uses? Not those who said 'Never' at Q16 or 'Don't know' at Q15	No
Q18	Where do you go most often to visit the cinema ? Those who visit the cinema at Q17	No	Q18	What do you like about (CENTRE MENTIONED AT Q15) ? [MR] Not those who said 'Don't know' at Q15	Particle parking and transport related responses
Q19	What town centre do you visit most often for pubs / clubs ? Those who visit pubs / clubs at Q17	No	Q19	What could be improved about (CENTRE MENTIONED AT Q15) that would make you visit it more often? [MR] Not those who said 'Don't know' at Q15	Particle parking and transport related responses
Q20	What town centre do you visit most often for restaurants/eating out? Those who visit restaurants / eat out at Q17	No	Q20	Why don't you visit (CENTRE MENTIONED AT Q15) for your household's shopping and town centre uses? [MR] Those who said 'Never' at Q16	Particle parking and transport related responses
Q21	Are there any leisure facilities that you think are lacking within a reasonable distance of your home?	No	Q21	Why don't you visit (CENTRE MENTIONED AT Q15) for most of your household's shopping and town centre uses? [MR] Those who said 'No' at Q17	Particle parking and transport related responses
GEN	Gender of respondent.	Yes	Q21X	Why don't you visit (CENTRE MENTIONED AT Q15) for your household's shopping and town centre uses? (all respondents who don't visit) [MR] Those who said 'Never' at Q16 or 'No' at Q17	Particle parking and transport related responses

2009			2019		
	Question	Analysed		Question	Analysed
AGE	Could I ask how old you are ?	Yes	Q22	Where do you normally do most of your household's shopping for men's, women's, children's and baby clothing and footwear? NOTE we mean fashion items - NOT sports clothing and footwear Excl. Nulls & SFT	Yes
SEG	Socio-economic grouping:	Yes	Q23	How do you normally travel to (LOCATION MENTIONED AT Q22)? Not those who said 'Internet / delivery' or 'Abroad' or '(Don't know / varies)' or '(Don't do this type of shopping)' at Q22	Yes
EMP	Which of the following best describes the chief wage earner of your household's current employment situation ?	Yes	Q24	Where do you normally do most of your household's shopping for CDs, vinyl, DVDs, Blurays, etc.) (Excluding gaming)? Excl. Nulls & SFT	No
CAR	How many cars does your household own or have the use of ?	Yes	Q25	Where do you normally do most of your household's shopping for audio visual, photographic, computer items (such as TVs, cameras, ipads, telephones etc) and all other domestic electrical goods (such as irons, kettles, fridges, freezers, dishwashers etc)? Excl. Nulls & SFT	No
INC	Approximately what is your total household income ?	Yes	Q26	Where do you normally do most of your household's shopping for books (incl. encyclopaedias, text books, guidebooks and musical scores) and stationery (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials? Excl. Nulls & SFT	No
ETH	The following question will be used in a statistical format only, and will help us to assess diverse needs and the level of access to services. What is your ethnic background ?	Yes	Q27	Where do you normally do most of your household's shopping for games & toys; pets and pet products; hobby items; sport clothing / footwear and equipment; camping goods; bicycles; and musical instruments? Excl. Nulls & SFT	No
-	-	-	Q28	Where do you normally do most of your household's shopping for furniture, carpets, other floor coverings and household textiles (includes beds, sofas, tables, etc)? Excl. Nulls & SFT	No
-	-	-	Q29	Where do you normally do most of your household's shopping for DIY goods, decorating supplies and garden products (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc)? Excl. Nulls & SFT	No
-	-	-	Q30	Where do you normally do most of your household's shopping on all goods for personal care (including, electric razors, hair dryers, bathroom scales, cosmetics, perfume, toothpaste, etc), other medical	No

2009			2019		
	Question	Analysed		Question	Analysed
				and pharmaceutical products (e.g. vitamins, plasters) and therapeutic appliances (e.g. spectacles, hearing aids, wheelchairs, contact lenses etc)? Excl. Nulls & SFT	
-	-	-	Q31	Where do you normally do most of your household's shopping on all other goods including jewellery & watches; glassware, china, tableware and household utensils; and other personal effects (e.g. travel goods, suitcases, prams, sunglasses)? Excl. Nulls & SFT	No
-	-	-	Q32	Do you or your household visit the following leisure attractions? [MR/PR]	No
-	-	-	Q33	Where do you or members of your household normally go to play bingo or visit casinos or bookmakers? Those that said 'Bingo / casino / bookmaker' at Q32 AND Excl. Nulls & SFT	No
-	-	-	Q34	Where do you or members of your household normally go to the cinema? Those that said 'Cinema' at Q32 AND Excl. Nulls & SFT	No
-	-	-	Q35	Where do you or members of your household normally go to use a gym / healthclub / sports facility? Those that said 'Gym / health club / sports facility' at Q32 AND Excl. Nulls & SFT	No
-	-	-	Q36	Where do you or members of your household normally go to visit the theatre, watch a concert or watch live music? Those that said 'Theatre / concert / music venue' at Q32 AND Excl. Nulls & SFT	No
-	-	-	Q37	Where do you or members of your household normally go to a museum, gallery, or other place of historical / cultural interest? Those that said 'Museum / gallery or place of historical / cultural interest' at Q32 AND Excl. Nulls & SFT	No
-	-	-	Q38	What location (e.g. town centre, shopping centre, retail/ leisure park) do you or members of your household normally go to when visiting pubs / bars / nightclubs? Those that said 'Pub / bar / nightclub' at Q32 AND Excl. Nulls & SFT	No
-	-	-	Q39	What location (e.g. town centre, shopping centre, retail/ leisure park) do you or members of your household normally go to for eating out (e.g. cafes and restaurants)? Those that said 'Restaurant / café / eating out' at Q32 AND Excl. Nulls & SFT	No

2009			2019		
	Question	Analysed		Question	Analysed
-	-	-	Q40	Where do you or members of your household normally go for family entertainment? Those that said 'Family entertainment (e.g. tenpin bowling, skating rink)' at Q32 AND Excl. Nulls & SFT	No
-	-	-	Q41	Where do you or members of your household normally go for (OTHER ACTIVITY FROM Q32)? Those that said 'Cycling', 'Fishing', 'Horse riding', 'Place of worship / religious meeting' or 'Walking' at Q32 AND Excl. Nulls & SFT	No
-	-	-	Q42	What improvements could be made to the leisure offer in your Council area that would make you visit / partake in leisure activities more often? [MR]	Particle parking and transport related responses
-	-	-	GEN	Gender of respondent:	Yes
-	-	-	AGE	Can I ask how old you are please?	Yes
-	-	-	CAR	How many cars does your household own or have the use of?	Yes
-	-	-	EMP	Which of the following best describes the chief wage earner of your household's current employment situation? [PR]	Yes

Source: 2009 and 2019 Household Surveys

Annex B - 2009 and 2019 Questions Analysed

2009		2019	
Q01	In which shop or shopping centre do you do most of your household's main food shopping ? (Not including don't do or internet / delivered at Q01)	Q01	Where do you normally shop for all your household's main food and grocery shopping needs (i.e. primarily bulk trolley purchases)? Excl. Nulls & SFT
Q02	How does your household normally travel to its main food shopping destination (STORE MENTIONED AT Q01)?	Q03	What do you like about (LOCATION MENTIONED AT Q01)? [MR] Not those who do their main food shopping via the internet at Q01
Q03	When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities, for example non-food shopping, leisure / entertainment activities, restaurants, bars, banks, etc? Those who used a shop or shopping centre (not including internet / delivered) at Q01	Q04	How do you normally travel to (LOCATION MENTIONED AT Q01)? Not those who do their main food shopping via the internet at Q01
Q05	In which town centre, freestanding store or retail park do you do most of your household's shopping for clothing, footwear and other fashion goods? (Not including internet / catalogue / mail order / tv shopping, abroad or don't buy at Q05)	Q05	When you visit (LOCATION MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)? [MR]Not those who do their main food shopping via the internet at Q01
Q06	How does your household normally travel to its main clothing and footwear shopping destination (LOCATION MENTIONED AT Q05)? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Q07	In addition to (LOCATION MENTIONED AT Q01), is there anywhere else you regularly use for your main-food shopping? Excl. Nulls & SFT
Q07	What do you like about the (LOCATION MENTIONED AT Q05) ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Q08	Which internet / home delivery retailer do you use? Those who do their main food shopping via the internet at Q07
Q08	What do you dislike about (LOCATION MENTIONED AT Q05) ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Q09	How much does your household normally spend on main food shopping in a week?
Q09	What would make you shop in or visit (LOCATION MENTIONED AT Q05) more often ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Q10	In addition to your main food shopping, where do you normally do most of your household's small scale top-up food shopping (i.e. the store you visit regularly (2+ times a week) to buy bread, milk, etc., on a day-to-day basis)? Excl. Nulls & SFT
Q10	How often do you visit (LOCATION MENTIONED AT Q05) in the evenings ? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Q18	What do you like about (CENTRE MENTIONED AT Q15) ? [MR] Not those who said 'Don't know' at Q15
Q11	What would make you stay longer in (LOCATION MENTIONED AT Q05) to use it in the evenings? Those who used a shop, freestanding store or retail park (not including internet / delivered or abroad) at Q05	Q19	What could be improved about (CENTRE MENTIONED AT Q15) that would make you visit it more often? [MR] Not those who said 'Don't know' at Q15
GEN	Gender of respondent.	Q20	Why don't you visit (CENTRE MENTIONED AT Q15) for your household's shopping and town centre uses? [MR] Those who said 'Never' at Q16
AGE	Could I ask how old you are ?	Q21	Why don't you visit (CENTRE MENTIONED AT Q15) for most of your household's shopping and

2009		2019	
			town centre uses? [MR] Those who said 'No' at Q17
SEG	Socio-economic grouping:	Q21X	Why don't you visit (CENTRE MENTIONED AT Q15) for your household's shopping and town centre uses? (all respondents who don't visit) [MR] Those who said 'Never' at Q16 or 'No' at Q17
EMP	Which of the following best describes the chief wage earner of your household's current employment situation ?	Q22	Where do you normally do most of your household's shopping for men's, women's, children's and baby clothing and footwear? NOTE we mean fashion items - NOT sports clothing and footwear Excl. Nulls & SFT
CAR	How many cars does your household own or have the use of ?	Q23	How do you normally travel to (LOCATION MENTIONED AT Q22)? Not those who said 'Internet / delivery' or 'Abroad' or '(Don't know / varies)' or '(Don't do this type of shopping)' at Q22
INC	Approximately what is your total household income ?	Q42	What improvements could be made to the leisure offer in your Council area that would make you visit / partake in leisure activities more often? [MR]
ETH	The following question will be used in a statistical format only, and will help us to assess diverse needs and the level of access to services. What is your ethnic background ?	GEN	Gender of respondent:
		AGE	Can I ask how old you are please?
		CAR	How many cars does your household own or have the use of?
		EMP	Which of the following best describes the chief wage earner of your household's current employment situation? [PR]

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Appendix D – Workshop Notes

4th April 2022

The Stage 2 stakeholder workshop was held on 4 April 2022. The session was attended by Transportation and Planning Officers from the four Black Country local authorities.

The purpose of the workshop was to outline the Stage 2 work to date, discuss any areas requiring further analysis and to provide an opportunity to raise any queries.

A discussion was held around the development of under-utilised surface car parks and the provision of multi-storey car parking. It was noted that there are plans to provide multi-storey car parks in Brierley Hill. The net provision approach outlined in the Wolverhampton Parking Strategy was raised as a potential option going forward.

Centres Study: Policy CEN2 in current draft form, no more formal targets proposed for new additional retail growth. No predicted retail growth – a big departure from the time of the 2011 strategy. The Merry Hill pre-conditions as set out in the adopted strategy therefore potentially to be replaced with a provision based on sustainability criteria and the focus will be on sustaining and making best use of the existing retail floor space.

It was also discussed that it is a priority to maximise housing development in centres.

It was agreed that the Stage 2 Report would include:

- A separate technical report for each of the Household Surveys undertaken appended to the main report and a brief summary of findings included within the main report.
- Consideration of representations on the Draft Plan as published. Only TfWM and LCP representations concern the centres and transport provisions of the Plan. A few representations are still outstanding but will also be reviewed for relevance.
- Format of the report and graphics contained within should be mindful that there are three audiences, the Planning Inspector (Reg19 report), members of the public and Elected Councillors.

Study 2 is to be completed by end May – the final report is to be produced following Black Country Officer consideration.

Workshop Actions

Actions	Responsibility
AECOM to speak with officers regarding Brierley Hill, broad details of emerging approach and policy principles	AECOM
AECOM to package up parking data to help with EV report for the BC	AECOM
Black Country Transport to provide EV data	AECOM
Review the Bus Back Better to understand relevance to this study	AECOM
Produce Household surveys Technical Reports	AECOM
Contact with TfWM insight team to check if they have relevant household surveys	AECOM

Meeting 5 May 2022

A follow up meeting with the Black Country Transport and Planning Officers was held on 5 May 2022 to provide an update on actions and to discuss actions arising from the April workshop. Actions arising from the meeting are outlined below:

Actions	Responsibility
Black Country Officers are discussing the need to strengthen the sustainable transport ambition in the BCP with TfWM to better align with the LTP Review. These discussions could also pick up future mobility themes.	Black Country Officers
Black Country Officers to review Park and Ride approach in the Draft Plan and to consider including a reference to the West Midlands Park and Ride Strategy.	Black Country Officers
Black Country Officers to consider how the link between Tier 1 and Tier 2 policies are best facilitated, in particular, to achieve the objective of a consistent approach to car parking in centres.	Black Country Officers
AECOM to send the presentation to meeting attendees for information and comment, and feedback to the specific queries posed.	AECOM
AECOM to email Officers in relation to Dudley Parking Strategic Review and any other draft documents, as referenced in Stage 1 Report.	AECOM
AECOM to send the draft Stage 2 report to the Black Country Officers for review on Friday 13 May.	AECOM

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