Shopping & Local Centres
Supplementary Planning Document (SPD)

Monitoring Report 2024

Birmingham City Council

Shopping & Local Centres SPD: Monitoring Report 2024

Context

The Shopping and Local Centres SPD was adopted in March 2012 and was produced to help address a range of issues affecting the vibrancy and vitality of Birmingham's network of shopping centres outside the city centre. Its purpose is to encourage investment into local centres and guide future development to help maintain a viable balance between retail and non-retail uses.

The SPD identifies a hierarchy of Town, District and Neighbourhood centres. This was modified on adoption of the BDP in 2017 to Sub-Regional Centre, District Growth Points, District Centres and Local Centres. For each centre a definitive boundary is established, within which a Primary Shopping Area (PSA) is identified.

The main policies established seek to:

1) maintain a minimum of 55% of units in the Primary Shopping Area of Town and District Centres and 50% of units in the Primary Shopping Area of Neighbourhood/Local Centres in A1 retail use.
2) avoid an overconcentration of A5 hot food take-away uses by restricting their number to no more than 10% of the total units in a centre or individual parade, and
3) ensure no individual proposal adversely affects local amenity or contribute to non-retail clustering.

Upon adoption of the Birmingham Development Plan (BDP), Policies 1 and 4 of the SPD were incorporated into BDP Policy TP24. This gives them full Development Plan status. The remainder of the SPD will be reviewed in future to reflect this, and clarify its role in identifying up-to-date Centre and Primary Shopping Area boundaries.

Baseline data

During the preparation of the SPD, detailed land use surveys were undertaken for each local centre. The survey data was mapped and summary land use information published on the Council's website along with the adopted SPD, Local Centres SPD. The survey data had a baseline date of April 2011.

Since adoption, the Council has monitored all planning permissions and refusals within centres and this has enabled us to assess how the policies are working and how the balance of uses may be changing.

Scope of monitoring

Monitoring reports have been produced annually since 2013. This monitoring information is dated to 1st April 2024.

Monitoring is usually based on desktop updates of planning permissions in view of the resource implications of re-surveying each centre every year. However, periodic full resurveys are required to keep the data as accurate as possible, and in 2022 full resurveys were undertaken. This involved 'on foot' surveys in all 73 centres, followed by the revision of approximately 8,200 GIS records. The 2024 update uses this data, plus planning applications/permissions from the following two years.

Use Class Order changes – September 2020

Statutory Instrument 2020 No. 757 - The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 made significant changes to Use Classes.

From 1st September 2020, the following Use Classes were discontinued:

- A1 Shops
- A2 Financial and Professional Services
- A3 Restaurants and Cafes
- A4 Drinking Establishments
- A5 Hot Food Takeaways
- B1 Offices
- D1 Non-residential Institutions
- D2 Assembly and Leisure

New Use Classes:

Class E - Commercial, Business and Service, which incorporates

- the previous A1, A2, A3 and B1 office uses
- gyms, nurseries and health centres previously in use classes D1 and D2
- other uses which are suitable for a town centre

Class F1 - Learning and Non-residential Institutions, incorporating those uses from the former D1 Non-residential institutions use class which are more likely to involve buildings which are regularly in wider public use such as schools, libraries and art galleries.

Class F2 - Local Community groups together those uses from the former D2 use class which provide for group activities of a more physical nature – swimming pools, skating rinks and areas for outdoor sports. It also includes the use of any buildings where this is principally by the local community.

Alongside these, the F2 class includes what would be considered shops servicing the essential needs of local communities. This is defined as a shop mostly for the sale of a range of essential dry goods and food to visiting members of the public where there is no commercial class retail unit within 1000 metres and the shop area is no larger than 280sq.m.

Sui Generis Uses include the former A4 Drinking Establishments and A5 Hot Food Takeaway use classes, along with cinemas, concert, dance and bingo halls which fell within the former D2 use class. This means that changes to and from these uses now require planning permission, for example, to ensure that local pubs can be protected, or to prevent the proliferation of hot food takeaways.

The residential (C classes), General industrial (B2) and Storage and distribution (B8) use classes remain unchanged (except for a new cross reference in B2 to the new 'commercial' class).

These changes will impact on the 50/55% threshold for retail (Class A1) uses in Primary Shopping Areas in BDP policy TP24. Class A1, A2, A3, B1 and a number of other uses have been replaced by the new Class E, which is much wider in scope. This means that changes between these former uses do not constitute development and therefore do not require planning permission. Class E provides for use, or part use, for all or any of the purposes set out in that Class. Together with changes to the General Permitted Development Order (notably Class MA which allows change of use from Use Class E to C3 Residential) means that effectively there is no planning control for maintaining the retail function of centres at 50/55% retail uses, undermining this part of Policy TP24. The Policy that no more than 10% of units within the centre or within any frontage shall consist of hot-food takeaways remains unaffected – the former A5 Use Class is now sub-class (r) of Sui Generis. We continue to monitor any newly constructed Class E uses or changes of use to and from Class to E where planning permission is required, e.g. B8 to E or vice versa.

The inclusion of former Class B1 (now Class E(g) uses) within Class E brings additional units into the calculations, which were not included previously. An increase in the total number of units in a centre or Primary Shopping Area has the effect of reducing the percentage of a given use class, when the number of units in that use remains static.

This change resulted in a small impact on the percentage calculations for Hot Food Takeaways in 2021, and the impact of that change is shown in the 2021 report. In summary, the change in percentages is minor (on average about 0.5%), and none of the centres close to the 10% policy threshold in 2021 could have accommodated an additional Hot Food Takeaway without exceeding it, and effectiveness of the policy remains unchanged.

The pre-2020 Use Classes have been retained in the underlying data sets to facilitate direct comparison with previous monitoring, if required.

Impact of the Covid-19 Pandemic

Statutory Instrument 2020 No. 330 - The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2020 came into force on 24th March 2020. It introduced a temporary Use Class DA, enabling Class A3 and A4 Uses to temporarily provide takeaway food within Class A5 from 24th March 2020 until 23rd March 2021, subject to notification of the local planning authority. Only a small number of notifications were received, and the temporary impact of this use was not significant enough to warrant further investigation. This provision has now ceased.

The future of town centres and retail following the pandemic, and the health of the leisure and hospitality sector, have recently been common topics of discussion. The long-term economic impact of the pandemic on local centres, including retail and other town centre uses, was initially expected to be negative. However, 3 years on it appears that any adverse impact has been minimal, and vacancy rates are generally much lower than the national average.

Vacancy rates have been updated and included in this report (see below), and statistics on the number and percentage of Class E(b) and Sui Generis hospitality uses have been calculated to assist with local centre health checks in connection with the emerging Birmingham Local Plan. Full details of these can be found as background documents to the Plan.

New Birmingham Local Plan

The Council has embarked on the preparation of a new Birmingham Local Plan, to replace the Birmingham Development Plan adopted in 2017. An Issues and Options consultation was undertaken in the autumn of 2022, with a Preferred Option published in July 2024.

As part of the evidence base for the new plan, the Council has commissioned Nexus Planning to undertake a Retail and Leisure Needs Assessment (RLNA), including health checks for the City Centre and District Centres, and recommendations for the hierarchy of centres. This work, and the Council's annual monitoring, will be used to inform policy decisions in the new Local Plan.

Local Centres Monitoring - Key Findings 2012 – 2024

Since the adoption of the Shopping & Local Centres SPD in 2012 and the application of its policies (now via BDP Policy TP24), the following decisions have been monitored. Changes to the Use Classes Order, as discussed, has made monitoring the retail function of centres problematic as no consent or notification to the local authority is required to change within the broad Class E use.

Table 1: Planning Permissions and refusals in Centres 2012-2024

	2012-2023	**2023-2024**	**Total**
Total number of relevant planning decisions	1453	79	1532
E(a) / A1			
Retail losses:			
Permissions leading to loss of E(a) / A1 retail use	388	11	399
Retail Gains:			
Permissions granted for new E(a) / A1 retail use	189 units	5 units	194 units
Permissions granted for Change of use (CoU) to E(a) / A1 retail use	81 units	9 units	90 units
Permissions granted for E(a) / A1 retail as part of mixed-use permissions	62 schemes, 225 units	3 schemes, 3 units	65 schemes, 228 units
Total Retail Gains:	495 units	17 units	512 units
E(c) / A2			
New construction or CoU to E(c) / A2 (financial & professional services) permissions	34 units	0 units	34 units
New A2 or CoU to E(c) / A2 as part of mixed permissions	12 units	0 units	12 units
E(b) / A3			
New construction or CoU to E(b) / A3 (restaurant & café) use	206 units	6 units	212 units
New E(b) / A3 as part of mixed permissions	45 units	7 units	52 units
SG(p/q) / A4			
New construction or CoU to SG(p/q) / A4 (drinking establishment) use	21 units	1 unit	22 units
New A4 or CoU to SG(p/q) / A4 as part of mixed permissions	14 units	2 units	16 units
SG(r) / A5			
New construction or CoU to SG(r) / A5 (hot food takeaway) use	62 units	1 unit	63 units
New A5 or CoU to SG(r) / A5 as part of mixed permissions	24 units	1 units	25 units
E(b)/SG(r) / A3/A5			
New or CoU to E(b)/SG(r) / A3/A5 permissions (not counted above)	61 units	6 units	67 units
E/F1 / D1			

	2012-2023	2023-2024	Total
New construction or CoU to F1 or E / D1 (non-residential institutions) use	71 units	5 units	76 units
New D1 or CoU to F1 or E / D1 as part of mixed permissions	9 units	1 unit	10 units
D2			
New D2 or CoU to E, F2 or SG / D2 (assembly & leisure) use	33 units	3 units	36 units
C3			
Conversion from E(g) / B1 (business) to C3 (residential) use	965 units including 22 schemes (97 units), plus 7 large schemes (728 units). Total 1693 units	2 schemes, 13 units	1706 units
Conversion from F1/E / D1 (non-residential institutions) to C3 (residential) use	9 units + 1 scheme - 1146 units + 268 extra care (Perry Barr Residential Scheme) Total 1423 units	0 schemes, 0 units	1423 units
Sui Generis			
New construction or CoU to Sui Generis use (excluding SG(p/q/r – A4/A5))	66 units (not monitored prior to 2016)	2 units	68 units
Refusals and appeals in centres			
E(b) / A3 refusals	39*	3	42
E(b) / A3 applications withdrawn	50*	0	50
SG(r) / A5 refusals	72	4	76
SG(r) / A5 applications withdrawn	27*	0	27
E(b)/SG(r) / A3/A5 refusals	30	4	34
E(b)/SG(r) / A3/A5 (or other mixed uses including A5) applications withdrawn	24*	0	28
SG(r) / A5 appeals	25	0	25
SG(r) / A5 appeals dismissed	20 (+1 withdrawn)	0	21
SG(r) / A5 appeals allowed	6	0	6
SG(r) / A5 appeals outstanding	0	0	0
A5 approvals and refusals outside centres			
New construction or CoU to SG(r) / A5 (hot food takeaway) use outside Centres	88 units	1 units	89 units
Mixed use proposals including SG(r) / A5 use outside Centres	40 units*	0 units	40 units
Number of SG(r) / A5 refusals outside Centres	76 units	2 units	78 units
Mixed use proposals including SG(r) / A5 use refused outside Centres	17 units*	0 units	17 units
SG(r) / A5 appeals allowed	1*	0	1
SG(r) / A5 appeals dismissed	0*	0	0
SG(r) / A5 appeals outstanding		0	0

*2014-24 only – not previously monitored.

Monitoring A1 Uses within Primary Shopping Areas

Class A1 became part of the new Class E on 1st September 2020, as sub-class E(a). Changes to the Use Classes Order have made monitoring the retail function of centres problematic as no consent or notification to the local authority is required to change within the broad Class E use. In 2022 we undertook full surveys of all 73 centres to observe these changes. However, it will not be possible to undertake full surveys every year, and for 2024 we have used planning application data to update the 2022 surveys.

Table 2 shows the percentage of Class E(a) retail uses within Primary Shopping Areas in comparison to the former Class A1 uses. Changes to the total number of units can arise from new build, changes of use, subdivision or amalgamation of existing units – in other words natural organic change. A full breakdown of uses and their respective percentages is available separately at Local Centres SPD.

Most centres remain within the BDP Policy TP24 (formerly SPD Policy 1) threshold of 50/55% for retail uses within Primary Shopping Areas. The exceptions are:

District Centres (55% threshold):
- Fox & Goose, at 50%, remains stable.
- Selly Oak, at just under 45%, is subject to significant redevelopment proposals. In 2021-22, both the total number of units and the number of E(a) Units increased, although the E(a) percentage fell slightly. This is unchanged for 2023-24. Cumulatively, with Permitted Development changes outside planning control, the policy thresholds have been breached, but in this instance the regeneration benefits are considered to be paramount.
- Harborne, at 51%, where the centre is stable but the number of E(a) units has fallen considerably post-Covid, but there is good representation from E(b), E(c) and Sui Generis uses.
- Kings Heath, at 53%, where there has been a small decrease in the number of E(a) units in the past two years.
- New Oscott (53.57%), where the number of E(a) units has remained stable but the centre has good representation from E(b), E(c) and Sui Generis uses.

Other centres (50% threshold):
- Queslett and Scott Arms, where the part of those centres within Birmingham lies below the 50% threshold, although in both cases the number and percentage of E(a) units remains stable.
- Ivy Bush, at 35.9%, but the centre is now stable.
- Balsall Heath (44%), College Road (45%), Hall Green (46%) and Yardley Road (44.7%), are stable centres but remain below the 50% threshold.
- Moseley and Slade Road are stable centres at the 50% threshold.

There are several centres where major redevelopments are proposed or in progress:

Extant or expired permission, but not started	Under construction
Erdington Stirchley Selly Oak	Kingstanding Circle Longbridge (Largely completed) Meadway

Table 2: Primary Shopping Area Statistics 2024

Centre	2011				2023					2024					
	No of PSA Units	No of A1 Units	PSA % A1	Status	No of PSA Units	No of A1 / E(a) Units	PSA % E(a)	% Trend 2011-2023	Status	No of PSA Units	No of A1 / E(a) Units	PSA % E(a)	E(a) Units & % Trend 2023-2024	% Trend 2011-2024	Status
Acocks Green	130	89	68.46		139	83	59.71	▼		140	84	60.00	▲/▲	▼	
Alum Rock Road	240	183	76.25		300	231	77.00	▼		301	232	77.08	▲/▲	▲	
Balsall Heath	27	14	51.85		27	12	44.44	▼		27	12	44.44	=/=	▼	
Boldmere	89	62	69.66		90	52	57.78	▼		90	52	57.78	=/=	▼	
Bordesley Green	39	26	66.67		33	23	69.70	▲		33	23	69.70	=/=	▲	
Castle Vale	11	10	90.91		11	8	72.73	▼		11	8	72.73	=/=	▼	
College Road	19	12	63.16		20	9	45.00	▼		20	9	45.00	=/=	▼	
Cotteridge	87	60	68.97		94	51	54.26	▼		94	51	54.26	=/=	▼	
Dudley Road	99	76	76.77		112	76	67.86	▼		113	76	67.26	▲/▼	▼	
Edgbaston (Five Ways)	53	37	69.81		49	26	53.06	▼		49	26	53.06	=/=	▼	
Erdington	241	159	65.98		218	143	65.60	▼		218	143	65.60	=/=	▼	
Fox and Goose	89	50	56.18		84	42	50.00	▼		84	42	50.00	=/=	▼	
Frankley	10	6	60.00		11	7	63.64	▲		11	7	63.64	=/=	▲	
Glebe Farm	25	20	80.00		24	18	75.00	▼		24	18	75.00	=/=	▼	
Green Lane	46	38	82.61		54	42	77.78	▼		54	42	77.78	=/=	▼	
Hall Green	79	49	62.03		82	38	46.34	▼		82	38	46.34	=/=	▼	
Harborne	129	84	65.12		126	64	50.79	▼		127	64	50.39	=/▼	▼	
Hawthorn Road	51	33	64.71		61	32	52.46	▼		61	31	50.82	▲/▼	▼	
Hay Mills	58	39	67.24		68	38	55.88	▼		68	38	55.88	=/=	▼	
Highfield Road	36	19	52.78		40	24	60.00	▲		39	23	58.97	▼/▼	▲	
Highgate	23	19	82.61		26	16	61.54	▼		26	16	61.54	=/=	▼	
Ivy Bush	21	12	57.14		39	14	35.90	▼		39	14	35.90	=/=	▼	
Jewellery Quarter	160	132	82.50		191	136	71.20	▼		191	136	71.20	=/=	▼	
Kings Heath	239	170	71.13		250	135	54.00	▼		251	133	52.99	▼/▼	▼	
Kings Norton Green	42	25	59.52		36	19	52.78	▼		36	19	52.78	=/=	▼	
Kingsbury	58	38	65.52		57	30	52.63	▼		57	30	52.63	=/=	▼	
Kingstanding Circle	65	41	63.08		71	42	59.15	▼		51	26	50.98	▼/▼	▼	
Ladypool Road	171	127	74.27		183	99	54.10	▼		183	99	54.10	=/=	▼	
Lea Village	36	24	66.67		40	23	57.50	▼		40	23	57.50	=/=	▼	
Longbridge	10	7	70.00		29	18	62.07	▼		29	18	62.07	=/=	▼	
Lozells	91	68	74.73		99	62	62.63	▼		99	62	62.63	=/=	▼	
Maypole	25	17	68.00		27	19	70.37	▲		27	19	70.37	=/=	▲	
Meadway *	31	28	90.32		7	7	100	▲		7	7	100	=/=	▲	
Mere Green	98	65	66.33		115	63	54.78	▼		115	64	55.65	▲/▲	▼	
Moseley	81	42	51.85		86	43	50.00	▼		86	43	50.00	=/=	▼	
New Oscott	65	42	64.62		84	45	53.57	▼		84	45	53.57	=/=	▼	
Newtown	21	13	61.90		23	16	69.57	▲		23	16	69.57	=/=	▲	
Northfield	175	133	76.00		166	108	65.06	▼		166	108	65.06	=/=	▼	
Olton Boulevard	57	39	68.42		61	39	63.93	▼		61	39	63.93	=/=	▼	
Pelham	77	51	66.23		87	55	63.22	▼		87	55	63.22	=/=	▼	
Perry Barr	143	102	71.33		125	91	72.80	▲		125	91	72.80	=/=	▲	
Queslett **					10	4	40.00	=		10	4	40.00	=/=	=	
Quiinton	No Primary Shopping Area														
Robin Hood	49	35	71.43		51	31	60.78	▼		51	31	60.78	=/▼	▼	
Rookery Road	115	84	73.04		122	83	68.03	▼		123	84	68.29	▲/▲	▼	

Centre	No of PSA Units	No of A1 Units	PSA % A1	Status	No of PSA Units	No of A1 / E(a) Units	PSA % E(a)	% Trend 2011-2023	Status	No of PSA Units	No of A1 / E(a) Units	PSA % E(a)	E(a) Units & % Trend 2022-2023	% Trend 2011-2021	Status
Scott Arms **					26	12	46.15	=		26	12	46.15	=/=	=	
Selly Oak	153	92	60.13		149	67	44.97	▼		148	66	44.59	▼/▼	▼	
Shard End ***	12	11	91.67		14	8	57.14	▼		14	8	57.14	=/=	▼	
Sheldon	119	80	67.23		132	74	56.06	▼		132	75	56.82	▲/▲	▼	
Short Heath	33	23	69.70		34	19	55.88	▼		34	19	55.88	=/=	▼	
Slade Road	38	21	55.26		40	20	50.00	▼		40	20	50.00	=/=	▼	
Small Heath	257	161	62.65		291	175	60.14	▼		291	175	60.14	=/=	▼	
Soho Road	236	169	71.61		257	168	65.37	▼		257	167	64.98	▼/▼	▼	
Sparkbrook	67	73	58.90		87	51	58.62	▼		87	51	58.62	▲/▼	▼	
Sparkhill	237	170	71.73		265	212	80.00	▲		265	212	80.00	=/=	▲	
Springfield	133	98	73.68		159	107	67.30	▼		159	106	66.67	▼/▼	▼	
Stechford	37	24	64.86		42	23	54.76	▼		42	23	54.76	=/=	▼	
Stirchley	117	76	64.96		109	61	55.96	▼		109	61	55.96	=/=	▼	
Sutton Coldfield	273	128	73.99		181	109	60.22	▼		181	109	60.22	=/=	▼	
Swan, Yardley ***	11	5	45.45		41	25	60.98	▲		41	25	60.98	=/=	▲	
The Radleys	43	30	69.77		43	27	62.79	▼		43	27	62.79	=/=	▼	
Timberley	39	27	69.23		25	15	60.00	▼		25	15	60.00	=/=	▼	
Tyseley	23	19	82.61		21	17	80.95	▼		21	17	80.95	=/=	▼	
Villa Road	36	26	72.22		47	30	63.83	▼		47	30	63.83	=/=	▼	
Walmley	28	21	75.00		28	18	64.29	▼		28	18	64.29	=/=	▼	
Ward End	64	42	65.63		69	44	63.77	▼		69	44	63.77	=/=	▼	
Weoley Castle	60	43	71.67		62	38	61.29	▼		62	38	61.29	=/=	▼	
West Heath	22	16	72.73		24	16	66.67	▼		24	16	66.67	=/=	▼	
Witton	99	56	56.57		113	74	65.49	▲		114	74	64.91	=/▼	▲	
Wylde Green	87	67	77.01		92	52	56.52	▼		92	52	56.52	=/=	▼	
Yardley Road	50	27	54.00		38	17	44.74	▼		38	17	44.74	=/=	▼	
Yardley Wood	24	17	70.83		24	14	58.33	▼		24	14	58.33	=/=	▼	
Yew Tree	59	42	71.19		57	34	59.65	▼		57	34	59.65	=/=	▼	

Note: Definitions of the number of units and calculation percentages are defined in Appendix 1 of the SPD.

For earlier trends, see previous Monitoring Reports.

▲	Trend – Use Class increasing in percentage
▼	Trend – Use Class decreasing in percentage
=	Percentage unchanged
	Policy compliant
	Policy compliant but close to, or at threshold
	Centre not policy compliant
*	The former Pool Meadow centre at Meadway has been demolished. The 2023 monitoring takes into account the first phase of planning permission, which is yet to be completed.
**	Queslett, Quinton, Scott Arms and Timberley local centres extend geographically beyond the city boundary. This monitoring applies only to the Primary Shopping Areas which are within Birmingham.
***	Major redevelopments at Shard End and Swan, Yardley were in progress in 2011, which affected the baseline statistics.

Monitoring A5 Uses within Centres

With regard to SPD Policy 4 (Hot Food Takeaways) and BDP Policy TP24, at the time of adoption of the SPD in 2012 almost half the local centres (33 out of 73) exceeded the policy's 10% threshold. It was chosen as an average, based on the baseline surveys, so it is expected that approximately half of the centres will exceed it.

In 2024, 24 centres exceeded the 10% threshold, a decrease of one from 2023 - significantly fewer than the 33 centres which exceeded it in 2012.

Nine centres are close to the 10% policy threshold: Balsall Heath, Bordesley Green, Edgbaston (Five Ways), Hall Green, Selly Oak, Stirchley, Witton, Yardley Wood and Yew Tree, which all currently contain in excess of 9% A5 uses. Any future proposals for Hot Food takeaways in these centres will require careful consideration if they are to remain policy compliant.

This is a particularly important consideration, as a takeaway was granted permission at Cotteridge in 2022-23 following an earlier refusal on the same site. Combined with the loss of a Class E unit to residential use (Permitted Development), this led to the 10% policy threshold being breached.

<u>**Table 3**: Percentage of Class A5/ Sui Generis(r) Hot Food Takeaway Uses Statistics 2024</u>

	2011				2023					2024					
Centre	**No of Units**	**No of A5 Units**	**Local Centre %A5**	**Status**	**No of Units in Centre**	**No of HFT Units**	**Local Centre % HFTs**	**% HFT Trend 2011-2023**	**Status**	**No of Units in Centre**	**No of HFT Units**	**Local Centre % HFTs**	**No of Units & % HFT Trend 2023-2024**	**% HFT Trend 2011-2024**	**Status**
Acocks Green	148	10	6.76		145	12	8.28	▲		144	12	8.33	=/▲	▲	
Alum Rock Road	237	18	7.59		300	24	8.00	▲		301	24	7.97	=/=	▲	
Balsall Heath	60	7	11.67		75	7	9.33	▼		75	7	9.33	=/=	▼	
Boldmere	89	4	4.49		92	3	3.26	▼		92	3	3.26	=/=	▼	
Bordesley Green	51	6	11.76		68	6	8.82	▼		68	6	8.82	=/=	▼	
Castle Vale	11	0	0.00		18	0	0.00	=		18	0	0.00	=/=	=	
College Road	25	3	12.00		29	5	17.24	▲		29	5	17.24	=/=	▲	
Cotteridge	117	12	10.26		128	13	10.16	▼		128	13	10.16	=/=	▼	
Dudley Road	125	17	13.60		146	19	13.01	▼		147	19	12.93	=/▼	▼	
Edgbaston (Five Ways)	61	2	3.28		76	7	9.21	▲		76	7	9.21	=/=	▲	
Erdington	236	14	5.93		240	15	6.25	▲		240	15	6.25	=/=	▲	
Fox and Goose	86	4	4.65		91	6	6.59	▲		91	6	6.59	=/=	▲	
Frankley	10	1	10.00		12	1	8.33	▼		12	1	8.33	=/=	▼	
Glebe Farm	42	7	16.67		43	6	13.95	▼		43	6	13.95	=/=	▼	
Green Lane	45	3	6.67		54	3	5.56	▼		54	3	5.56	=/=	▼	
Hall Green	78	8	10.26		88	8	9.09	▼		89	8	8.99	=/▼	▼	
Harborne	186	7	3.76		191	9	4.71	▲		192	8	4.17	=/=	▲	
Hawthorn Road	51	4	7.84		61	4	6.56	▼		61	4	6.56	=/=	▼	
Hay Mills	69	10	14.49		80	7	8.75	▼		80	7	8.75	=/=	▼	
Highfield Road	43	3	6.98		51	2	3.92	▼		50	2	4.00	=/=	▼	
Highgate	25	3	12.00		28	5	17.86	▲		28	5	17.86	=/=	▲	
Ivy Bush	45	7	15.56		49	6	12.24	▼		49	6	12.24	=/=	▼	

Centre	No of Units	No of A5 Units	Local Centre %A5	Status	No of Units in Centre	No of HFT Units	Local Centre % HFTs	% HFT Trend 2011-2023	Status	No of Units in Centre	No of HFT Units	Local Centre % HFTs	No of Units & % HFT Trend 2023-2024	% HFT Trend 2011-2024	Status
Jewellery Quarter	172	1	0.58		210	2	0.95	▲		210	2	0.95	=/=	▲	
Kings Heath	246	11	4.47		270	10	3.70	▼		273	10	3.66	=/▼	▼	
Kings Norton Green	43	2	4.65		41	1	2.44	▼		41	1	2.44	=/=	▼	
Kingsbury	56	6	10.71		57	7	12.28	▲		57	7	12.28	=/=	▲	
Kingstanding Circle	66	7	10.61		73	5	6.85	▼		53	4	7.55	▼/▲	▼	
Ladypool Road	170	11	6.47		189	10	5.29	▼		189	10	5.29	=/=	▼	
Lea Village	36	8	22.22		41	8	19.51	▼		41	8	19.51	=/=	▼	
Longbridge	16	5	31.25		40	4	10.00	▼		39	4	10.26	=/▲	▼	
Lozells	96	12	12.50		110	12	10.91	▼		110	12	10.91	=/=	▼	
Maypole	35	4	11.43		39	3	7.69	▼		39	3	7.69	=/=	▼	
Meadway *	32	1	3.13		7	0	0.00	▼		7	0	0.00	=/=	▼	
Mere Green	96	3	3.13		115	6	5.22	▲		115	7	6.09	▲/▲	▲	
Moseley	109	7	6.42		135	6	4.44	▼		135	6	4.44	=/=	▼	
New Oscott	59	6	10.17		84	5	5.95	▼		84	5	5.95	=/=	▼	
Newtown	21	1	4.76		23	1	4.35	▼		23	1	4.35	=/=	▼	
Northfield	193	10	5.18		199	13	6.53	▲		199	13	6.53	=/=	▲	
Olton Boulevard	55	8	14.55		61	9	14.75	▲		61	9	14.75	=/=	▲	
Pelham	73	9	12.33		87	11	12.64	▲		87	11	12.64	=/=	▲	
Perry Barr	142	8	5.63		129	6	4.65	▼		129	6	4.65	=/=	▼	
Queslett **					10	2	20.00	=		10	2	20.00	=/=	=	
Queslett (whole centre)	19	3	15.79		29	3	*10.34*	▼		29	3	*10.34*	=/=	▼	
Quinton **	24	3	12.50		13	1	7.69	▼		13	1	7.69	=/=	▼	
Quinton (whole centre)					30	3	*10.00*			30	3	10.00	=	=	
Robin Hood	50	6	12.00		55	6	10.91	▼		55	6	10.91	=/=	▼	
Rookery Road	114	11	9.65		122	9	7.38	▼		123	9	7.32	=/=	▼	
Scott Arms **					26	0	0.00	=		26	0	0.00	=/=	=	
Scott Arms (whole centre)	75	6	8.00		77	8	*10.39*	▲		77	8	*10.39*	=/=	▲	
Selly Oak	155	12	7.74		183	18	9.84	▲		181	18	9.94	=/=	▲	
Shard End ***	12	0	0.00		13	2	15.38	▲		13	2	15.38	=/=	▲	
Sheldon	118	7	5.93		139	12	8.63	▲		138	12	8.70	=/▲	▲	
Short Heath	39	5	12.82		41	5	12.20	▼		41	5	12.20	=/=	▼	
Slade Road	59	8	13.56		71	10	14.08	▲		71	10	14.08	=/=	▲	
Small Heath	250	27	10.80		335	29	8.66	▼		335	29	8.66	=/=	▼	
Soho Road	297	21	7.07		377	22	5.84	▼		375	22	5.87	=/▲	▼	
Sparkbrook	67	6	8.96		90	4	4.44	▼		90	4	4.44	=/=	▼	
Sparkhill	241	12	4.98		281	16	5.69	▲		281	16	5.69	=/=	▲	
Springfield	150	15	10.00		167	15	8.98	▼		167	15	8.98	=/=	▼	
Stechford	36	5	13.89		42	5	11.90	▼		42	5	11.90	=/=	▼	
Stirchley	139	13	9.35		176	16	9.09	▼		176	16	9.09	=/=	▼	
Sutton Coldfield	229	2	0.87		274	9	3.28	▲		272	9	3.31	=/▲	▲	
Swan, Yardley ***	26	4	15.38		59	3	5.08	▼		59	3	5.08	=/▼	▼	
The Radleys	42	7	16.67		47	9	19.15	▲		47	9	19.15	=/=	▲	
Timberley **	39	4	10.26		25	4	16.00	▲		25	4	16.00	=/=	▲	
Timberley (whole centre)					36	5	*13.89*			36	5	13.89	=	=	
Tyseley	22	2	9.09		21	1	4.76	▼		21	1	4.76	=/=	▼	
Villa Road	57	7	12.28		80	9	11.25	▼		81	9	11.11	=/▼	▼	

Walmley	29	2	6.90		34	3	8.82	▲		34	3	8.82	=/=	▲	

Centre	No of Units	No of A5 Units	Local Centre %A5	Status	No of Units in Centre	No of HFT Units	Local Centre % HFTs	% HFT Trend 2011-2023	Status	No of Units in Centre	No of HFT Units	Local Centre % HFTs	No of Units & % HFT Trend 2023-2024	% HFT Trend 2011-2024	Status
Ward End	65	7	10.77		81	12	14.81	▲		81	12	14.81	=/=	▲	
Weoley Castle	59	8	13.56		62	9	14.52	▲		62	9	14.52	=/=	▲	
West Heath	22	2	9.09		24	2	8.33	▼		24	2	8.33	=/=	▼	
Witton	96	12	12.50		113	12	10.62	▼		114	11	9.65	▼/▼	▼	
Wylde Green	98	7	7.14		104	9	8.65	▲		104	9	8.65	=/=	▲	
Yardley Road	46	5	10.87		52	6	11.54	▲		52	6	11.54	=/=	▲	
Yardley Wood	26	3	11.54		31	3	9.68	▼		31	3	9.68	=/=	▼	
Yew Tree	77	4	5.19		76	7	9.21	▲		76	7	9.21	=/=	▲	

Note: Definitions of the number of units and calculation percentages are defined in Appendix 1 of the SPD.
For earlier trends, see previous Monitoring Reports.

▲	Trend – Use Class increasing in percentage
▼	Trend – Use Class decreasing in percentage
=	Percentage unchanged
	Policy compliant
	Policy compliant but close to, or at threshold
	Centre not policy compliant
*	The former Pool Meadow centre at Meadway has been demolished. The 2023 monitoring takes into account the first phase of planning permission, which is yet to be completed.
**	Queslett, Quinton, Scott Arms and Timberley local centres extend geographically beyond the city boundary. The 2023 monitoring applies only to the parts of those centres within Birmingham, although the whole centre figures are also shown for comparison.
***	Major redevelopments at Shard End and Swan, Yardley were in progress in 2011, which affected the baseline statistics.

Vacancy Rates

The future of town centres and retail following the pandemic, and the health of the leisure and hospitality sector led to the inclusion of vacancy rates in the 2022 report, and this has been continued. The national average is 13.8%. Most centres in Birmingham currently show average, or lower than average vacancy rates except for Edgbaston (Five Ways), Frankley, Hay Mills, Highgate, Ivy Bush, Slade Road, Stirchley and Timberley. Erdington, Sutton Coldfield and Swan, Yardley are close to, but below the average rate.

Table 4: Vacancy Rates in Centres 2024

Centre	No of Units in Centre	No of Vacant Units	Vacancy Rate
Acocks Green	144	11	7.64%
Alum Rock Road	301	26	8.64%
Balsall Heath	75	5	6.67%
Boldmere	92	3	3.26%
Bordesley Green	68	6	8.82%
Castle Vale	18	0	0.00%
College Road	29	1	3.45%
Cotteridge	128	9	7.03%
Dudley Road	147	14	9.52%

Edgbaston (Five Ways)	76	15	19.74%
Erdington	240	31	12.92%
Fox and Goose	91	5	5.49%
Frankley	12	3	25.00%
Glebe Farm	43	2	4.65%
Green Lane	54	5	9.26%
Hall Green	89	0	0.00%
Harborne	192	15	7.81%
Hawthorn Road	61	3	4.92%
Hay Mills	80	13	16.25%
Highfield Road	50	4	8.00%
Highgate	28	5	17.86%
Ivy Bush	49	9	18.37%
Jewellery Quarter	210	17	8.10%
Kings Heath	273	18	6.59%
Kings Norton Green	41	0	0.00%
Kingsbury	57	6	10.53%
Kingstanding Circle **	53	3	5.66%
Ladypool Road	189	7	3.70%
Lea Village	41	3	7.32%
Longbridge	39	1	2.56%
Lozells	110	2	1.82%
Maypole	39	1	2.56%
Meadway **	7	7	100.00%
Mere Green	115	10	8.70%
Moseley	135	16	11.85%
New Oscott	84	3	3.57%
Newtown	23	1	4.35%
Northfield	199	21	10.55%
Olton Boulevard	61	1	1.64%
Pelham	87	4	4.60%
Perry Barr	129	11	8.53%
Queslett (Birmingham only) *	10	0	0.00%
Queslett (whole centre)	29	0	0.00%
Quinton (Birmingham only) *	13	1	7.69%
Quinton (whole centre)	30	3	10.00%
Robin Hood	55	3	5.45%
Rookery Road	123	11	8.94%
Scott Arms (Birmingham only) *	26	1	3.85%
Scott Arms (whole centre)	77	3	3.90%
Selly Oak	181	22	12.15%
Shard End	13	0	0.00%
Sheldon	138	12	8.70%
Short Heath	41	3	7.32%
Slade Road	71	17	23.94%
Small Heath	335	14	4.18%
Soho Road	375	44	11.73%
Sparkbrook	90	5	5.56%
Sparkhill	281	8	2.85%
Springfield	167	8	4.79%
Stechford	42	1	2.38%
Stirchley	176	41	23.30%
Sutton Coldfield	272	36	13.24%
Swan, Yardley	59	8	13.56%
The Radleys	47	1	2.13%
Timberley (Birmingham only) *	25	5	20.00%

Timberley (whole centre)	36	5	13.89%
Tyseley	21	0	0.00%
Villa Road	81	8	9.88%
Walmley	34	1	2.94%
Ward End	81	3	3.70%
Weoley Castle	62	2	3.23%
West Heath	24	1	4.17%
Witton	114	8	7.02%
Wylde Green	104	9	8.65%
Yardley Road	52	3	5.77%
Yardley Wood	31	1	3.23%
Yew Tree	76	2	2.63%

*	Queslett, Quinton, Scott Arms and Timberley local centres extend geographically beyond the city boundary. Vacancy rates are shown for both part and whole centres.
**	Major redevelopments at Kingstanding Circle and Meadway are proposed. Vacancy rates in these locations are temporary.

Conclusions

- Of the city's District Centres, Fox & Goose, Selly Oak, Harborne, Kings Heath, Mere Green and New Oscott fall below the minimum 55% PSA threshold for Class A1 Uses in BDP Policy TP24. Kings Heath, and New Oscott miss the threshold by 1% or less.
- Balsall Heath, College Road, Ivy Bush, Hall Green and Yardley Road fall below the Local Centre minimum 50% PSA threshold for Class A1 Uses in BDP Policy TP24.
- Moseley and Slade Road are at the 50% threshold.
- Queslett, Quinton, Scott Arms and Timberley are centres which extend beyond the city boundary. Baseline monitoring in 2011 calculated the Policy 1 percentage on the whole of Queslett and Scott Arms. From 2013 this was revised to only the parts within Birmingham, causing a significant decrease in the percentage figures in those centres, which has since remained static. For 2022, whole centre figures were included for comparative purposes.
- Following complete resurveys in 2022/23, the same approach has been adopted for Quinton and Timberley.
- Meadway is currently subject to redevelopment. The figures in this report are based on extant planning permission only, and are theoretical rather than a true reflection.
- Selly Oak continues to experience a unique mix of uses which reflect its position catering for a large student population.
- 24 out of 73 centres contain over 10% A5 uses.
- 49 centres are under 10% A5 uses, of which 9 are in excess of 9% A5s.
- Prior to adoption of the SPD, Class A5 Uses were being approved in the absence of strong policy. Extant consents accounted for some increases in A5 Uses above the 10% threshold in Policy 4 before 2014, but this trend has now ceased. The exceptions are occasional appeal decisions where a long term void unit is better brought into beneficial use than remain empty, and one instance where a combination of a recent permission and the changing number of commercial units has resulted in the threshold being marginally exceeded.
- There is a continuing slow net decline in the number of units in Class E(a) (former Class A1) uses. This is mainly due to a trend for change to E(b) (former A3) Cafes and Restaurants, and Sui Generis uses.
- The number of refused and withdrawn planning applications for A5 uses indicates that the policy is effective as intended, and therefore relevant.

- There is a slightly lower ‘return flow’ of changes into retail use from other uses, mainly as Permitted Development.
- Organic change in centres continues, which accounts for small changes in percentage rates.
- Vacancy rates in most centres are at, or below average.