

JOINT RETAIL AND COMMERCIAL LEISURE STUDY – 2018

**For North Dorset District Council, West Dorset District Council, and
Weymouth & Portland Borough Council**

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1 INTRODUCTION

- 1.1 Carter Jonas ('CJ') was commissioned by North Dorset District Council, West Dorset District Council and Weymouth & Portland District Council (hereafter referred to as the '*Dorset Councils Partnership*') to produce a '*Joint Retail and Commercial Leisure Study*' to help inform both plan-making and development management decisions across the three local authority areas. The findings of the study will specifically provide the robust evidence base required to help inform the reviews of the North Dorset Local Plan and the West Dorset, Weymouth and Portland Local Plan.
- 1.2 The study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the *National Planning Policy Framework* (NPPF) published in March 2012. Where relevant the study also draws on advice set out in the *National Planning Practice Guidance* (PPG), published in March 2014, which places significant weight on the development of positive plan-led visions and strategies to help ensure the vitality of town centres. The sequential and impact 'tests' are also key to both plan-making and decision-taking at the local level.
- 1.3 The assessment of the need (or 'capacity') for new retail (convenience and comparison goods) floorspace has been carried out at the strategic level to help inform the likely scale, type, location and phasing of new retail development over the short (0-5 years), medium (6-10 years) and long term (11-15 years).
- 1.4 The study/catchment area defined for the purpose of this study principally covers the three local authority areas, but also extends to a wider area incorporating parts of neighbouring authorities to reflect broader shopping and leisure patterns (**Appendix 1**). The study area has been divided into twelve zones that broadly reflect the population distribution and local catchments of the main study centres. The defined study area and zones provide the framework for the new telephone interview survey of some 1,200 households conducted by NEMS Market Research (NEMS) in July 2017. The full (weighted) survey results are set out in **Appendix 25**. The survey provides the most up-to-date and robust evidence on shopping patterns, leisure preferences and expenditure flows within the study area. In addition to this street interview surveys were also conducted in Weymouth and Dorchester to help understand shopping patterns and leisure preferences in these centres, and perceptions of these centres as places to shop, live, work and visit for a range of activities and uses. The survey findings have also informed the health check assessments for the main study centres, as well as the quantitative ('capacity') and qualitative need assessments for new retail (convenience and comparison goods) floorspace and leisure uses over the plan period.
- 1.5 For ease of reference this report is structured as follows:
- **Section 2** reviews the national and local planning policy context material to retail planning and town centres.
 - **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail and leisure sectors at the national and local level, and how this has shaped (and is likely to shape) the UK's urban and retail landscape.
 - **Section 4** sets out the results of the market share analysis for convenience and comparison goods shopping and leisure use across the study area based on the household telephone interview survey (HTIS). The market share tabulations for convenience and comparison goods (including Special Forms of Trading¹) are set out in **Appendix 5-6**.

¹ Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

- **Sections 5-18** set out the health check methodology (Section 5) and key findings of the health checks for the main centres identified by the local authorities for more detailed analysis as part of the Local Plan Review in: North Dorset (i.e. Blandford Forum, Gillingham, Shaftesbury, Sturminster Newton and Stalbridge); Weymouth and Portland (i.e. Weymouth and Easton – Portland); and West Dorset (i.e. Dorchester, Bridport, Sherborne, Lyme Regis, Poundbury and Beaminster). The overall vitality and viability of these centres has been assessed using the Key Performance Indicators (KPIs) set out in the PPG. This assessment principally draws on published research (such as, for example, Experian Goad reports – where available), our own town centre audits, site visits and stakeholder engagement. The health check assessment also takes account of the results of the household telephone interview survey (**Appendix 25**), supplemented by the in-centre surveys conducted in Dorchester and Weymouth (**Appendix 26**), which provide robust evidence on the current attraction, role and function of these centres in the retail hierarchy.
- **Section 19** sets out the key assumptions and forecasts underpinning the quantitative need ('retail capacity') assessment and the outputs of CJ's in-house CREATE (excel-based) capacity model. This includes an assessment of:
 - (i) the forecast study area and zonal populations: drawing on our in-house Experian-based ONS national population figures and the population projections provided by each local planning authority which take account of local dwelling-based projections (**Appendix 2**).
 - (ii) total available retail (convenience and comparison goods) expenditure in the study area at 2017 and the forecast growth to 2036: based on Experian figures and forecasts (**Appendix 3 and 4**).
 - (iii) the forecast convenience (**Appendix 10**) and comparison (**Appendix 11**) turnovers of all existing centres/stores: informed by the survey-derived market share analysis.
 - (iv) the forecast capacity for new retail (convenience and comparison) floorspace in West Dorset and its main centres (**Appendix 12-13**); Weymouth and Portland (**Appendix 14-15**); and North Dorset (**Appendix 16-17**).
- **Section 20** sets out the findings of the commercial leisure and other town centre uses 'gap' assessment. This looks at current leisure provision and the potential need over the plan period for new food and beverage uses, cinema, gyms, etc.
- Finally, **Sections 21-23** provide advice on how the forecast retail and leisure need identified for each local authority area and the main centres over the plan period can be met "*in full*" in compliance with the NPPF (paragraph 23). This is based on a high level review of the main development opportunity sites identified by the respective local authorities in the main centres at the time of preparing this study (also see **Appendix 18-20**). The sites have been broadly assessed against the sequential test set out in the NPPF and PPG, specifically in terms of their availability, suitability and viability to accommodate new retail floorspace, commercial leisure and other mixed uses. It should be noted at this stage that detailed viability, financial and market testing has not been carried out. We therefore recommend that each local authority, where needed, undertake more detailed assessments to better understand the future viability and deliverability of the main sites identified. This could take the form of planning and development briefs for specific sites, through to wider Masterplans and Development and Investment Frameworks for the main centres. The concluding sections also provide wider policy recommendations on appropriate locally-set impact thresholds in compliance with the NPPF (paragraph 26); as well as the definition of shopping frontages and primary shopping areas, and the relative role and function of the main centres in the network and hierarchy of centres (NPPF, paragraph 23).

1.6 When considering and assessing the findings of this retail assessment it is important to understand at the outset that capacity forecasts beyond a five year (short-term) time period should be interpreted with caution as they are subject to increasing margins of error. We therefore advise that although this updated study provides the robust evidence base required to help inform plan-making, site allocations and the determination of planning applications at the local level, the forecasts should be updated regularly to take into account any significant new retail development at the local level; changes in the retail expenditure and population growth

forecasts over time; as well as any potential impacts arising from other key trends in the retail and leisure sectors (such as, the growth in internet shopping) and commercial leisure sectors. For example, a significant growth in the market share of on-line internet shopping above current forecasts will substantially reduce the capacity for new 'physical' retail floorspace over the plan period, as well as the market demand from retailers for representation in town centres.

2 PLANNING POLICY OVERVIEW

- 2.1 This section provides a high level overview of the relevant national and local development plan planning policy pertaining to retail and town centre uses, along with other material considerations.

National Planning Policy Framework (NPPF)

- 2.2 The NPPF was published in March 2012 and sets out the planning policies for England and how these are expected to be applied. It reinforces the importance of up-to-date plans and strengthens local decision making. The NPPF must be taken into account in the preparation of Local Plans and Neighbourhood Plans. At the heart of the NPPF is a presumption in favour of sustainable development, which is seen as *'a golden thread running through both plan-making and decision-taking'* (paragraph 14). The NPPF (paragraph 14) sets out the Government's view of what sustainable development means in practice for both plan-making and decision-taking at the local level.
- 2.3 For plan-making the Framework states that local planning authorities should positively seek opportunities to meet the development needs of their area. Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits. The Framework (paragraph 15) states that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that *'...it is clear that development which is sustainable can be approved without delay'*.
- 2.4 The NPPF (paragraph 17) sets out twelve core planning principles that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should be genuinely plan-led; proactively drive and support sustainable economic development to deliver thriving local places; promote mixed use developments; focus significant development in locations which are or can be made sustainable; and deliver sufficient community and cultural facilities and services to meet local needs.
- 2.5 The Framework (paragraph 150) emphasises that Local Plans are *'...the key to delivering sustainable development that reflects the vision and aspirations of local communities'*. They should be *'aspirational but realistic'* and should set out the opportunities for development and clear policies on *'...what will or will not be permitted and where'* (paragraph 154). Only those policies that provide a clear indication of how a decision maker should react to a development proposal should be included in the plan. Any additional Development Plan Documents (DPDs) should only be used where clearly justified (paragraph 153).
- 2.6 The NPPF (paragraph 156) requires strategic priorities for the area covered by the Local Plan to deliver the homes and jobs needed in the area; the provision of retail, leisure and other commercial development; and the provision of health, security, community and cultural infrastructure and other local facilities; etc. Crucially the NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements plan positively for the development and infrastructure required in the area; be drawn up over an appropriate time scale (preferably 15 years); indicate broad locations for strategic development on a key diagram and land-use designations on a Proposals Map; allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate; and identify land where development would be inappropriate, for instance because of its environmental or historic significance.
- 2.7 In terms of the evidence-based approach to planning, the Framework states LPAs should ensure that the Local Plan is based on *'...adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area'* (paragraph 158). Furthermore the assessment of,

and strategies for housing, employment and other uses should be integrated, and take full account of relevant market and economic signals. LPAs should use this evidence base to assess the needs for land or floorspace for economic development, including for retail and leisure development; examine the role and function of town centres and the relationship between them; assess the capacity of existing centres to accommodate new town centre development; and identify locations of deprivation which may benefit from planned remedial action. The NPPF is clear that pursuing sustainable development requires ‘...careful attention to viability and costs in plan-making and decision-taking’ (paragraph 173).

2.8 The Framework (paragraphs 18-149) sets out thirteen key ‘principles’ for delivering sustainable development, including building a strong, competitive economy; ensuring the vitality of town centres; promoting sustainable transport; delivering a wide choice of high quality homes; requiring good design; promoting healthy communities; protecting Green Belt land; and conserving and enhancing the natural and historic environment. In terms of ‘ensuring the vitality of town centres’ the NPPF (paragraph 23) states that planning policies should be positive and promote competitive town centre² environments, as well as setting out policies for the management and growth of centres over the plan period. When drawing up Local Plans, LPAs should amongst other considerations:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas³, based on a clear definition of primary and secondary frontages⁴ in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail and leisure development needed in town centres;
- ensure that the needs for retail and leisure are ‘met in full’ and ‘not compromised by limited site availability’. Assessments should therefore be undertaken of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

² The NPPF (Annex 2) states that references to town centres or centres apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

³ Primary shopping area is defined by the NPPF (Annex 2) as the defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

⁴ The NPPF (Annex 2) states that ‘primary frontages’ are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. ‘Secondary frontages’ provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

2.9 When assessing and determining applications for main town centre uses⁵ that are not in an existing centre and not in accordance with an up-to-date Local Plan, the Framework requires that LPAs should:

- Apply a sequential test⁶, which requires applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only consider out-of-centre locations if suitable sequentially more preferable sites are not available. When considering edge and out of centre proposals, *'...preference should be given to accessible sites that are well connected to the town centre'* (paragraph 24). Applicants and LPAs should demonstrate flexibility on issues such as format and scale.
- Require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sqm). The NPPF (paragraph 26) states that this should include assessment of the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years then the impact should also be assessed up to ten years from the time the application is made.

2.10 The NPPF (paragraph 27) states that *'...where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused'*.

National Planning Practice Guidance (PPG)

2.11 This study also draws on advice set out in the National Planning Practice Guidance (PPG), published in March 2014. The PPG has streamlined and replaced the advice previously set out in the PPS4 Practice Guidance on Need, Impact and the Sequential Approach. The revised PPG still places significant weight on the development of positive plan-led visions and strategies for town centres, and thus retains the key sequential and 'impact tests'. Of relevance to this study the PPG (para 003) states that the assessment of the potential for centres to accommodate new development and different types of development should cover a *'three-five year period'* but should *'also take the lifetime of the Local Plan into account and be regularly reviewed'*.

Local Planning Policy Context – North Dorset

2.12 The current Development Plan documents and relevant evidence base documents for the Council consist of the following:

- North Dorset Local Plan Part 1 (2016)
- North Dorset District-Wide Local Plan (Saved Policies) (2003)
- Joint Retail Assessment Christchurch Borough Council, East Dorset District Council, North Dorset District Council, and Purbeck District Council Volume 1 & 2 (2008)
- Employment Land Review: North Dorset Review of Existing Sites (2007)
- Eastern Dorset Strategic Housing Market Assessment (SHMA) (2015)
- Assessing the Growth Potential of Gillingham, Dorset (2009)
- Station Road Area (Sturminster Newton) Design & Development Brief (2008)

⁵ NPPF (Annex 2) defines 'main town centre uses' as retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

⁶ This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

- Western Dorset Economic Growth Strategy (2016)
- Relevant Neighbourhood Plans

2.13 A high level review of these documents follows below (for more detail please refer to the respective Councils' websites).

North Dorset Local Plan Part 1 (2016)

2.14 The North Dorset Local Plan Part 1 (2016) sets out the strategic planning policies for the district from 2011 to 2031. This document is used alongside other Local Plan documents to make decisions on planning applications.

2.15 Policy 12 (Retail, Leisure and Other Commercial Developments) sets out the main policy relating to retail and town centre uses, and identifies North Dorset's hierarchy of retail centres with four main town centres (Blandford Forum, Gillingham, Shaftesbury, and Sturminster Newton). The policy recognises that town centres are at the heart of local communities and as such, this policy seeks to support their viability and vitality. The policy also aims to retain the primacy of retail shops in the district's town centres; change of use resulting in the loss of A1 class units in primary shopping frontage (PSF) areas will not be permitted, and in secondary shopping frontage (SSF) areas change of use resulting in the loss of A class units will also not be permitted. In addition, Policy 12 seeks to retain and enhance existing outdoor weekly markets within the district and therefore any development that would prejudice their operation will not be permitted. Policy 12 also sets out that the Council will seek to meet the identified needs for main town centre uses by:

- working to reduce vacancy rates in town centre shops;
- encouraging the implementation of extant planning permissions for additional retail floorspace;
- working with communities to take forward proposals for town centre enhancement and growth through neighbourhood planning; and
- permitting retail and other main town centre uses in town centres and on sites identified for mixed-use regeneration on the edge of Gillingham, Shaftesbury and Sturminster Newton town centres.

2.16 Policy 27 (Retention of Community Facilities) seeks to ensure that community facilities (both commercial and non-commercial) are retained. As such, development (including change of use) which involves the loss of commercial community facilities will be permitted only if it can be demonstrated that the use is no longer commercially viable. In a similar manner, the loss of a non-commercial community facility will be only permitted if it is no longer practical or desirable to use the facility for its existing use.

2.17 Specific spatial policies for managing growth and change for each of the town centres (and the countryside) are also included within the Local Plan (see policies 2, 6 and 16-20):

- Policy 2 (Core Spatial Strategy) sets out that whilst the four main towns of Blandford Forum, Gillingham, Shaftesbury and Sturminster Newton function as the main centre for services and employment opportunities within North Dorset, Stalbridge and the eighteen larger villages have been identified as the focus for growth to meet the local needs outside of the four towns.
- Policy 6 (Housing Distribution) states that a minimum of 825 dwellings, out of 5,700 dwellings district-wide, will be provided in the countryside (including Stalbridge and the villages) during the period 2011-2031.
- Policy 16 (Blandford) sets out that Blandford will maintain its role as the main service centre in the south of North Dorset through development within the settlement boundary; housing extensions to the southeast and to the west of Blandford St Mary and; employment uses on land within the bypass on the northern edge of the town and the mixed use regeneration of the brewery site close to the town centre. In

the period up to 2031 additional retail floorspace will be provided through the extension of the existing Tesco at Stour Park and the provision of a new supermarket at Shaftesbury Lane. An important town centre regeneration site includes the land to the south of East Street including land around the existing retail store. Growth will be taken forward in a way which respects Blandford Forum's environmental constraints. The policy also establishes the need for at least 1,200 homes during the period 2011-2031.

- Policy 17 (Gillingham) states that Gillingham's role as the main service centre in the north of the district will be maintained through the enhancement of the town centre and the mixed use regeneration of the Station Road area, development of a strategic site allocation to the south of the town, development of a range of employment sites including the southern extension of Brickfields Business Park and; an enhanced green infrastructure network. At least 2,200 homes will also be provided between 2011 and 2031. Policy 21 (Gillingham Strategic Site Allocation) sets out the details for the mixed use southern extension of Gillingham that will expand the built up area of the town to the south and east. The main areas proposed for development include land to the east of Ham, land to the south of Ham, land to the east of Lodden Lakes and land to the south of Brickfields Business Park. The extension will comprise mainly residential development with some employment uses and a local centre including convenience stores, health facilities, a school and other community facilities. A Masterplan Framework will be prepared for the site to guide comprehensive and coordinated development.
- Policy 18 (Shaftesbury) sets out that Shaftesbury will maintain its role to serve the needs of the northern part of the district through the provision of at least 1,140 homes before 2031 on land to the east of the town, to the southeast of Wincombe Business Park and to the west of the A350 opposite Wincombe Business Park. Employment needs will be met in part by the development of land to the south of the A30 whilst mixed use regeneration will be encouraged on land in and to the east of the town centre. Opportunities for tourist related uses sensitive to the town's distinctive landscape and historic setting will be considered favourably.
- Policy 19 (Sturminster Newton) states that Sturminster Newton will maintain its role as the main service centre in the rural west of North Dorset through the development of greenfield land at Market Hill, small greenfield extensions to the north and east of the town and development of North Dorset Business Park at Newton. In terms of retail provision, the main focus for development will be within the existing town centre and the redevelopment of the Station Road area. Between 2011 and 2031 there is a need for at least 395 dwellings.

- 2.18 The North Dorset Local Plan Part 1 states that whilst the North Dorset District-Wide Local Plan 2003 (see below) does not define town centre boundaries for Blandford Forum, Gillingham, Shaftesbury or Sturminster Newton, these will instead be defined as part of the site allocations within the Local Plan Part 2⁷, unless a community decide to define a boundary for their town centre in a neighbourhood plan. In the interim, the Council will use the existing evidence available for development management purposes to determine whether a site is within a town centre. This evidence includes: the draft town centre boundaries identified in the Council's 2005 Annual Monitoring Report, evidence base studies such as the Gillingham (2012) and Sturminster Newton (2008) Town Design Statements and evidence in earlier planning applications for main town centre uses where the sequential test has been applied.

North Dorset District-Wide Local Plan (Saved Policies) (2003)

- 2.19 The North Dorset District-Wide Local Plan was adopted in 2003. Whilst the majority of the Local Plan policies have been replaced by the Local Plan Part 1 (2016), some policies remain 'saved', and continue to form part of the Development Plan. The key saved policies pertaining to retail are as follows (note that these policies are saved only in respect of PSFs and SSFs):

⁷ The preparation of Local Plan Part 2 has been superseded by the [Local Plan Review](#) which will result in a new North Dorset Local Plan, replacing both the North Dorset District-Wide Local Plan (Saved Policies) 2003 and the North Dorset Local Plan Part 1

- Policy 3.16 (New Retail Outlets in Town Centres) states that the development of additional retail uses (A1) will be permitted within PSF areas, and the development of financial and professional services (A2) and food and drink uses (A3) will be permitted within SSF areas, subject to criteria set out in Policy 3.17 (see below).
- Policy 3.17 (Change of Use in Retail Areas) seeks to resist the loss of A1 class units within PSF areas. Change of use of A1 class units to A2 and A3 class units will be permitted where the vitality and viability of the area is not prejudiced; the change does not result in an unacceptable concentration of similar uses; and the existing shop frontage is retained.

2.20 The notes on page 380 of the North Dorset Local Plan Part 1 state that these frontages will continue to be used for development management purposes until they are reviewed through the North Dorset Local Plan Part 2 or in a neighbourhood plan. In the interim, the Council will also have regard to the recommended frontages as identified within this study. In making any decisions the Council will use the most up to date policy in relation to uses in these areas and this is Policy 12 of North Dorset Local Plan Part 1 that is in keeping with national policy at this time.

Joint Retail Assessment Christchurch Borough Council, East Dorset District Council, North Dorset District Council, and Purbeck District Council Volume 1 & 2 (2008)

- 2.21 This joint town centre and retail study was produced in 2008 and included an assessment of the main town and district centres within the four local authority areas. The recommendations and projections within this study helped to inform the preparation of the North Dorset Local Plan Part 1 (2016).
- 2.22 The Joint Retail Assessment Volume 1 identified capacity for both new convenience and comparison goods floorspace in Blandford, Gillingham, Shaftesbury and Sturminster Newton. The evidence-based document put forward a number of broad areas of possible action the Councils could pursue in order to maintain and enhance the role of the shopping centres. These included:
- improving the range and choice of shops and services in all centres by intensification and the re-occupation of vacant units;
 - maintaining a high quality environment within each centre;
 - incorporating measures to improve accessibility and public transport to district and local centres; and
 - incorporating measures to bring forward development opportunities to improve the availability of modern premises suitable for new occupiers.
- 2.23 Volume 2 of the Joint Retail Assessment suggested that the strategy for accommodating growth in North Dorset in particular should be based on maintaining existing market shares over the plan period, and reducing the existing level of shop vacancies. The assessment recommended that Shaftesbury, Gillingham, Blandford and Sturminster Newton should be defined as Town Centres, and Stalbridge should continue to be designated as a district centre. However, it should be noted that although the Joint Retail Assessment identified Stalbridge's designation in 2008 as a district centre, it was in fact a local centre, as per its designation in the 2003 Local Plan. Therefore we expect that the report should have recommended Stalbridge moving up the hierarchy to become a district centre. Marnhull was identified as having only limited retailing which is spread around the settlement and, on this basis, it was recommended that it should no longer be designated as a Local Centre within the retail hierarchy. A number of changes to shopping frontages within the four main centres were also recommended.

Employment Land Review: North Dorset Review of Existing Sites (2007)

- 2.24 The current and future suitability of existing employment sites (as identified in the Local Plan) was reviewed in the Employment Land Review (ELR). This document assessed sites to ensure: there was sufficient provision for future economic development; that employment land is appropriately located across the district; and that land has a reasonable prospect of being realised for development. The ELR identified 13 of the district's 40 employment sites that required a more detailed assessment to establish if they should be retained, assessed further or recommended for release through the plan preparation process. Of these 13 sites, it was recommended that three should be released. The key sites identified as having potential to accommodate mixed use development included:

- The Brewery Site, Blandford;
- Station Road, Gillingham; and
- The Creamery, Sturminster Newton.

Eastern Dorset 2015 Strategic Housing Market Assessment (SHMA) (2015)

- 2.25 The SHMA is intended to assist the Council in assessing the needs for market and affordable housing across the North Dorset and the Eastern Dorset Housing Market Area. The SHMA considers the future need for housing in the following local authorities over the period 2013 to 2033: Bournemouth, Christchurch, East Dorset, North Dorset, Poole, and Purbeck. The document explains that the objectively assessed housing need between 2013 and 2033 is 2,883 dwellings per annum for the Eastern Dorset Housing Market Area. For North Dorset, the objectively assessed housing need is 330 dwellings per annum. In terms of sizes of homes, the SHMA identifies that North Dorset has a particular need for one and two-bedroom homes. Furthermore, in terms of types of homes, analysis on the whole shows that North Dorset has a particularly low need for flats and a significant need for houses.
- 2.26 It should be noted that the DCLG's 'Planning for the Right Homes in the Right Places: Consultation Proposals' document published in September 2017 sets out the government's proposals for calculating local housing need. The proposed approach is split into three stages which would comprise setting a demographic baseline which is then modified to account for market signals. A cap is also proposed to limit any increase an authority may face when they review their plan. In line with these proposals, the government published figures on housing need based on the proposed formula for the period between 2016 to 2026. This identifies a greater number of dwellings per annum for North Dorset at 366. This figure is reflected in the Issues and Options report which was consulted on from November 2017-January 2018.

Western Dorset Economic Growth Strategy (2016)

- 2.27 The document sets out how the Economic Growth Strategy, by 2033, will have supported and delivered: (i) 20,000 new homes; (ii) 13,200 new full-time jobs; (iii) a minimum of 70 hectares of new employment land; and (iv) an additional £564 million of GVA to the Western Dorset Area. The areas Economic Growth Zones are identified as Weymouth, Dorchester, Portland, Blandford Forum, Gillingham and Shaftesbury. The aspiration is to achieve a better balance and more sustainable futures, whilst simultaneously releasing the major housing, employment and investment potential of these economic areas.

Blandford+ Neighbourhood Plan 2015-2031 Submission Plan (2016)

- 2.28 The Blandford + Neighbourhood Plan 2015-2031 was submitted for examination in the summer of 2016 and the Examiner's Report published in July 2017. North Dorset District Council is required under the Town and Country Planning Act 1990 (as amended) to have regard to a post-examination neighbourhood plan when

determining a planning application, so far as that plan is material to the application. It is important to note that Policy 2 (Land at Shaftesbury Lane, Blandford Forum), Policy 5 (East Street/ Langton Road, Blandford Forum), and Policy 6 (West Street, Blandford Forum) set out proposals that include retail development. Furthermore, Policy 8 (Blandford Forum Town Centre) defines the town centre area and the PSFs and SSFs. The policy explains that any proposal that results in the net loss of public car parking spaces in the town centre area will be refused, unless community benefit outweighs the net loss of public car parking spaces.

Gillingham Neighbourhood Plan 2016-2031 – Submission Version (2017)

- 2.29 The Gillingham Neighbourhood Plan has been submitted for examination and although not ‘made’, can be given some weight. The submission document sets out the following vision in relation to retail and town centre uses: *‘Gillingham will have a strong and vibrant town centre, where the variety of town centre businesses generates a positive atmosphere in the High Street, with activity during the day and at night time’* (p6.). The plan, through Policies 7, 8, and 9, seeks to help Gillingham town centre adapt to new changes in retailing and the likely expansion due to increasing population. In particular, this document encourages a comprehensive approach to be taken to the regeneration around Station Road to create a town centre sub-area that will both link and provide support to the High Street.

Sturminster Newton Neighbourhood Plan 2016-2031 Submission Version (2017)

- 2.30 As with the above neighbourhood plans, although not made, the Sturminster Newton Neighbourhood Plan Submission Version can be given some weight. A number of the draft policies are relevant to this study: Policy 15 (Improving the Town Centre) sets out that town centre development proposals will be supported where they maintain a strong retail presence within the town centre area, including the expansion of the street market, maintain a range of services and facilities to attract visitors to the town, protect and enhance the historic environment and create a safe pedestrian public realm; Policy 16 (Uses in the Shopping Frontages Protection Zone) states that within the main shopping frontages, ground floor units should fall within Use Class A1, A2, A3, A4, A5, D2 or D1; Policy 17 (Protecting Town Centre Area) states that development should be in keeping with the predominant character of the area; Policy 18 (Shop Fronts) sets out the requirements for the design and alteration of new and existing shop fronts; and Policy 19 (Town Centre Public Realm Improvements) sets out the principles for the remodelling of the public realm in the town centre.

Local Planning Policy Context – West Dorset and Weymouth & Portland

- 2.31 The extant development plan policies, guidance and evidence base for West Dorset and Weymouth & Portland Council's consist of the following documents:
- West Dorset, Weymouth & Portland Local Plan (2015)
 - Joint Town Centre and Leisure Study (JTCTLS) (2008) and Update (2010)
 - Local Economic Assessment for Bournemouth, Dorset, and Poole (2011)
 - Employment Land Review for West Dorset and Weymouth & Portland (2013)
 - Dorchester/ Weymouth Strategic Housing Market Assessment (SHMA) (2012)
 - Poundbury Development Brief (2006)
 - Bridport South West Quadrant Regeneration Framework (2002)
 - Weymouth Town Centre Masterplan (2015)
 - An Economic Growth Strategy for North Dorset, West Dorset and Weymouth & Portland (2016)

West Dorset, Weymouth & Portland Local Plan (2015)

- 2.32 The West Dorset, Weymouth & Portland Local Plan (2015) sets out the overall strategic vision of the borough up to 2031 along with the issues to be addressed over the plan period including the Council's approach to affordable housing, employment land, community facilities and the broad location of new housing. The local plan is the main document used when making decisions on planning applications.
- 2.33 Policy ECON4 (Retail and Town Centre Development) of the plan outlines all principles relating to retail. The pre-ambles to this policy sets out the hierarchy of retail centres with five 'Town Centres' defined (namely Weymouth, Dorchester, Bridport, Sherborne, and Lyme Regis) and a number of 'Local Centres' (including Easton, Fortuneswell and Beaminster). This policy emphasises that development proposals relating to town centre development should be appropriate in type and scale to the particular centre, and any development that is likely to lead to significant adverse impacts on existing centres will be refused. In relation to retail frontages, development will be expected to maintain an appropriate mix and concentration of retail and other town centre uses in order to protect its vitality and viability. In terms of frontages, retail uses will typically comprise up to 75% and above of the ground floor PSF; and retail and other town centre uses should make up around 75% of ground floor SSFs. Furthermore, the policy states that residential or commercial uses on upper floors of premises in town centres will be encouraged, subject to the ground floor use not being undermined.
- 2.34 Specific spatial policies for managing growth and change for each of the town centres are also included within the Local Plan.
- 2.35 For **Weymouth** this includes WEY 1 (Weymouth Town Centre Strategy), which is the main policy for the town centre. It sets out a number of aims which development within the centre should meet, including: (i) establishing an attractive public realm which utilises the waterfront setting; (ii) support a thriving town centre comprising a range of local and multiple traders, a diverse cultural offer and strong night time economy; (iii) addressing the 5pm-9pm gap; (iv) and improving the first impressions of the area, including the main arrival points and; (v) managing flood risks. There are also a number of policies addressing the key sites within the town centre strategy area, including:
- WEY2 (Town Centre Core and Commercial Road Area) - is the main focus of the existing town centre. The policy states that the PSA will continue to be the main retail core, whilst the land to the west of the PSA will be development to accommodate a mix of uses to create an active waterside frontage and links between the PSA and the waterfront.
 - WEY3 (Station Area and Swannery Car Park) - outlines the development opportunities for this key town centre site. The policy sets out the aims to develop a new transport hub to help enhance the gateway site. The car park site will continue to provide the main public parking space. Linkages between the car park and station area to the town centre will be improved.
 - WEY4 (Custom House Quay and Brewery Waterfront) - sets out the aims for the Brewery to be retained as a major tourist facility alongside the enhancement of the waterfront.
 - WEY6 (Ferry Peninsula) - states that the peninsula is to be redeveloped to include leisure and tourism uses as well as being supported by complementary town centre uses.
 - WEY7 (Westway Road and North Quay Area) - sets out that this area will be redevelopment to provide mixed uses including residential, commercial, retail and hotel uses. Redevelopment may proceed in phases.
- 2.36 Some of the more relevant policies for **Dorchester** include:
- DOR1 (Poundbury Mixed Use Development) - establishes that the aim of Poundbury is to provide for the strategic growth of the town through mixed use development. Development must also be in accordance with the Poundbury Development Brief (2006).

- DOR4 (Charles Street) - identifies land at Charles Street as a key town centre retail development site within the PSA. The first phase of this site has been completed and comprised the district council offices. Despite the potential boost this site could provide to retail floorspace in the centre, there are concerns regarding land assembly costs and viability.
- DOR5 (Future Town Centre Expansion) - allocates land off Trinity Street as a preferred site for retail development within the PSA.
- DOR6 (Weymouth Avenue Brewery Site) - guides development at the Brewery site including the delivery of a mix of residential units, arts centre, hotel, retail, a transport interchange and linkages to the town centre. Much of this site has since been developed out and is now open although not all phases are complete.

Joint Town Centre and Leisure Study (JTCTLS) (2008) and Update (2010)

- 2.37 The Joint Town Centre and Leisure Study was produced in 2008 and updated in 2010 and informs the Councils' Local Development Framework going forward, as well as the assessment and determination of future retail and leisure led proposals in Weymouth and Dorchester and the smaller towns within the West Dorset area.
- 2.38 The 2008 study concluded that there was no further capacity for convenience provision in Weymouth. In terms of comparison goods, there was a need for an increase in the representation of quality fashion retailers to enhance and diversify the centre's offer. However, the size of retail units was considered to be detracting national retailers from locating in the town. In Dorchester it was recommended that the Council makes provision within the emerging LDF (at the time of the report being published) to accommodate in the region of 800 sqm net and 13,000 sqm net of convenience and comparison floorspace respectively to meet the identified capacity to 2017.
- 2.39 The updated study reflects on the changes in the state of the economy, changes in expenditure assumptions, turnover efficiency, as well as population and floorspace revisions following the 2008 assessment. The report concluded that capacity for convenience floorspace has increased in Weymouth and Dorchester Town Centres since the previous study, but despite these increases, convenience capacity remains marginal. Capacity for comparison floorspace in both town centres was also found to have reduced.

Local Economic Assessment for Bournemouth, Dorset, and Poole (2011)

- 2.40 The Local Economic Assessment has been produced to provide a robust evidence base which will assist decision makers and local communities in identifying both actions and strategies needed to support future growth. This document provides an assessment of: (i) economic competitiveness; (ii) the industrial and business structure; (iii); the local labour market; and (iv) sustainable infrastructure.
- 2.41 One of the key conclusions from the assessment is that the area faces some critical challenges in terms of its economy, due to relatively high levels of recorded multiple deprivation. The document states that cuts to the public sector are more likely to significantly affect both West Dorset (in particular Dorchester) and Weymouth and Portland than other parts of the LEA area and thus further exacerbate such challenges. Notwithstanding this, the 2012 Olympic sailing events that were held in the area provided an opportunity to promote investment and this address such challenges. Other future challenges identified included:
- low growth levels in comparison to enterprise levels;
 - public sector cutbacks;
 - voluntary and community sector funding pressure;
 - an aging population;

- an affordable housing shortage;
- a shortage of skilled workers; and
- a constrained supply of employment land.

Employment Land Review for West Dorset and Weymouth & Portland (2013)

- 2.42 The Employment Land Review (ELR) seeks to assess the existing and future supply of land available for economic development and its sufficiency and suitability to meet identified needs. The report assesses both the characteristics and quality of employment sites in West Dorset, Weymouth and Portland to provide an assessment of the 'fitness for purpose' of the employment land portfolio. In summary, whilst the majority of sites within the West Dorset District Local Plan (2005) and the Weymouth and Portland Borough Local Plan (2005) were found to be suitable to contribute to future employment land supply, the following 4 allocations were found to have no potential for additional future employment uses: (i) land at St Andrews in Bridport; (ii) Catherstone Manor Farm in Charmouth; (iii) Woodberry Down in Lyme Regis; and (iv) land at Charlton Down. Of the remainder, some 13 sites totalling 40.5ha were considered to have potential to accommodate new employment uses and a further 27 sites totalling 722.9ha were considered appropriate for employment uses as part of a potential mixed use scheme. There were also 45 sites totalling 43.2ha of land with permission for employment uses at the time.

West Dorset, Weymouth & Portland Strategic Housing Market Report (SHMA) (2014) and subsequent update note

- 2.43 This report provides an objective assessment of the housing needs for the Western Dorset Housing Market Area (HMA) in accordance with the approach advocated in national policy and guidance. In previous work the Western Dorset HMA was established as the area covered by the two local authorities of West Dorset and Weymouth & Portland and this approach was carried forward into the 2014 assessment of housing need.
- 2.44 National guidance indicates that the starting point for assessing the housing needs of an area should be the latest demographic projections. This report used the 2012 sub-national population projections (adjusted to give a figure for households) to estimate that 554 new dwellings per annum were required to meet need arising from demographic change. However this figure was considered to not truly reflect the housing needs of the area over the plan period (to 2031) due to the effects of the recession.
- 2.45 A number of scenarios were tested to eliminate the effects of the recession and allow for a growth in the local labour force. The resulting assessment of housing need for the area was established as 775 dwellings per annum. This figure gave sufficient headroom above the 2012 household projections allowing for a return to pre-recessionary housing market activity and to allow for an element of economic growth. This figure forms the housing target for the adopted local plan.
- 2.46 In relation to affordable housing need, the report used the approach set out in national guidance to establish overall affordable housing need. The results of this were then refined to more closely reflect the local housing market conditions and gave affordable housing need figure of 130 for Weymouth and Portland and 104 for West Dorset.
- 2.47 In February 2017, the Government signalled their intent to standardise the approach to calculating housing numbers through the publication of the Housing White Paper- Fixing the Broken Housing Market. The draft methodology released in September 2017 suggested an annual housing target of 780 dwellings per annum across the West Dorset, Weymouth & Portland Local Plan Area.

Poundbury Development Brief (2006)

- 2.48 The Poundbury Development Brief was prepared to guide decisions on planning applications for the future development of Poundbury. The document not only identifies the land uses to be provided in the future development of Poundbury, but it also identified how: (i) development will be distributed across the site; (ii) the infrastructure and community facilities to be provided; and (iii) how development will relate to the surrounding environment.

Bridport South West Quadrant Regeneration Framework (2002)

- 2.49 The Bridport South West Quadrant Regeneration Framework was prepared in close co-operation with the local community, town and parish councils, and key partners to set the framework for physical regeneration in the town. This document has been based on an analysis of various constraints, issues and aspirations relating to the natural environment, the built environment and community need, for the future development of Bridport.

Weymouth Town Centre Masterplan (2015)

- 2.50 The Weymouth Town Centre Masterplan sets out proposals for the transformation of the town centre into a vibrant and prosperous community, with a minimum of 600 new homes and 2,700 jobs across five sites in Weymouth town centre, regenerating 58 hectares of brownfield land. The five key sites include Lodmoor Gateway, Station Gateway, Commercial Road, Harbourside, and Peninsula.

Economic Growth Strategy for North Dorset, West Dorset and Weymouth & Portland 2017-33 (2016)

- 2.51 The document sets out how the Economic Growth Strategy, by 2033, will have supported and delivered: (i) 20,000 new homes; (ii) 13,200 new full-time jobs; (iii) a minimum of 70 hectares of new employment land; and (iv) an additional £564 million of GVA to the Western Dorset Area. The areas Economic Growth Zones are identified as Weymouth, Dorchester, Portland, Blandford Forum, Gillingham and Shaftesbury. The aspiration is to achieve a better balance and more sustainable futures, whilst simultaneously releasing the major housing, employment and investment potential of these economic areas.

Summary

- 2.52 In summary, the underlying objective of both the NPPF and Local Plan policy is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations 'first'. This policy objective is crucial as town centres are facing increasing economic challenges associated with alternative forms of retailing; in particular online shopping (discussed further in Section 3).
- 2.53 Notwithstanding the town centre first policy, this does not rule out edge-of-centre development where identified needs cannot be met in existing primary shopping areas (PSAs). Indeed the NPPF (paragraph 23) encourages local planning authorities to assess the potential to expand town centres to ensure a sufficient supply of suitable sites. If edge of centre sites cannot be identified to meet the identified needs 'in full', then local planning authorities are required by the NPPF to set policies for meeting the identified needs in other accessible locations that are well connected to the town centre, subject to an assessment of the impact of any proposed retail and town centre uses on the vitality and viability of existing centres. In the context of this study the policies of North Dorset, West Dorset and Weymouth & Portland Councils provide a context to maintaining and enhancing town centres. For the future, this has to be set in context with the dynamics of the retail economy (**Section 3**) and planning policy.

3 NATIONAL RETAIL AND TOWN CENTRE TRENDS

- 3.1 This section summarises some of the key trends that have fuelled the changes in the retail sector over the last three decades, and the impact of these trends on the UK's town centres. It provides a commentary on the impact of the downturn in the economy since 2007 and the growth of internet ('multi-channel') retailing on consumer spending, retail development and retailers' business strategies. Drawing on the latest research it also describes how these trends may continue to shape changes in the future, and whether and how town centres can respond to help maintain and enhance their overall vitality and viability.

Retail Trends

- 3.2 Following an unprecedented period of growth in retail sales and expenditure since the mid-1990s, the onset of the longest and deepest economic recession in living memory in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices). This reduced disposable income and retailers' margins were squeezed further.
- 3.3 Official figures show that the UK recovery began in early 2013 and although GDP growth peaked at 2.9% in 2014, it slowed to around 2% in 2015 and 2016 against the backdrop of a weaker global economy and further uncertainty on financial markets. The Brexit vote and subsequent triggering of Article 50 is likely to further dampen business/consumer confidence and the prospects for new investment and growth in the near future. Indeed, over the last 12 months the UK has shifted from being one of the fastest growing G7 economies to among the slowest. Against this background of economic and political uncertainty, Experian Business Strategies project lower GDP growth of around +1.5% in 2017 and 2018.
- 3.4 This dampening in economic growth is also impacting on household income and spending, and ultimately retail sales. The combination of higher inflation, a decline in real wages, a rise in interest rates and a tightening of consumer credit will continue to place a drag on real incomes and consumer spending. Experian forecast that retail sales growth will average 1% in 2018 and 1.9% in 2019.
- 3.5 The table below shows the actual and forecast growth in retail (convenience and comparison goods) spending per head identified by Experian Business Strategies in their latest *Retail Planner Briefing Note 15* ('Briefing Note') published in December 2017. This is based on their 'central forecast scenario' which assumes annual growth in GDP averaging 2% from 2016 to 2036

Table 3.1 Forecast year-on-year growth in retail expenditure per capita

Volume Growth per head (%)	-----ACTUAL GROWTH-----										EXPERIAN FORECASTS					HISTORIC TRENDS	
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020-24	2025-36		1997-07	1997-16
Total Retail Spend	2	-2.8	0.7	-1.1	1.3	1.9	2.1	2.8	3.5	1.4	0.4	1.2	2.2	2.3		5.4	3.5
Convenience	-4.2	-4.2	-0.6	-3.3	-0.2	-0.3	-0.3	-1	1	0	-0.6	-0.2	0.1	0.1		0	-0.6
Comparison	4.4	-2.9	1.4	0.1	2.3	3.5	3.6	5.2	5	2.3	0.9	2.1	3.2	3.2		8.3	5.6

Source: Experian Retail Planner Briefing Note 15 (December 2016); Figures 1a and 1b.

Notes: The table also shows historic growth rates for the period 1997-2007 (the pre-recession period) and for 1997-2016.

- 3.6 As the table shows, there has been negative annual growth in convenience goods expenditure per capita levels between 2008 and 2015. Although there was positive growth of +1% in 2016, the forecasts show a

return to no or negative growth over the period 2017 to 2019, with limited growth of +0.1% thereafter up to 2036. The forecast growth rates compare with previous historic trends of no growth between 1997 and 2007, and negative growth of -0.5% over the long term, between 1997 and 2016.

- 3.7 For comparison goods the Experian data indicates that annual growth rates are recovering from a low of -2.9% in 2009, to a peak of +5.2% in 2015 and +5% in 2016. However, for the reasons set out above, Experian forecast a dampening in growth in the immediate post-Brexit period; to +2.3% in 2017, +0.9% in 2018 and +2.1% in 2019. Thereafter, comparison spend growth is forecast to average circa +3.2% between 2020 and 2036. Despite the growth forecast by Experian, it is clear that comparison goods growth rates are well below historic trends of +8.3% per annum for the period 1997 to 2007.
- 3.8 Any further dampening of growth rates over the medium to long term could have implications for the viability of existing retail businesses and the take-up of new space, as well the need ('capacity') for new retail floorspace over the forecast period. This needs to be taken into account when assessing and reviewing the capacity forecasts for new convenience and comparison goods floorspace set out in this report.

Special Forms of Trading and Internet Shopping

- 3.9 One of the key trends that has impacted on the retail sector and shopping patterns over the last decade has been the growth in internet shopping, which forms part of special forms of trading (SFT)⁸. Based on ONS data, Experian Business Strategies (EBS) estimate that:
- The value of internet sales in 2017 is estimated to be £55.1bn (at current prices). This represents a +31% increase from £42.1bn in 2015 and a +13% increase from £48.9bn recorded in 2016.
 - The value of other (non-internet) SFT sales (e.g. mail order, vending machines, market stalls, etc.) is estimated to be £8.8bn in 2017. This represents a more modest growth from circa £8.5bn in 2016 and £7.9bn in 2015.
 - Total non-store retail sales are therefore estimated to amount to some £63.9bn in 2017. This represents a 28% growth in sales from £50bn in 2015 a substantial increase from £17.1bn recorded in 2006.
 - The overall market share of SFT, as a proportion of total retail sales, has increased nationally from 5.4% in 2006 to 16.5% in 2017. It is forecast by Experian to grow to 19.3% by 2021 and to 22.5% by 2036 (see table below)

Table 3.2 SFT's market share of total retail sales

	2017	2021	2026	2033	2036
TOTAL:	16.5%	19.3%	20.9%	22.1%	22.5%
Comparison	19.7%	22.5%	23.4%	23.8%	24.0%
Convenience	10.8%	13.1%	15.5%	17.2%	17.8%

Source: Appendix 3 of Experian Retail Planner Briefing Note 15 (December 2017)

- 3.10 This significant growth is being sustained by new technology (such as browsing and purchasing through mobile phones) and the development of interactive TV shopping. Although Experian forecast that the pace of

⁸ Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

e-commerce growth will slow after 2020, other commentators suggest that the growth and market share could be higher.

- 3.11 However such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than from 'virtual' stores and/or distribution warehouses. On this basis Experian has adjusted the SFT market shares downwards to reflect the proportion of internet sales sourced from existing stores.

Table 3.3 Revised forecast growth in SFT's market share of total retail sales

	2017	2021	2026	2033	2036
TOTAL:	10.6%	12.4%	13.6%	14.5%	14.9%
Comparison	14.8%	16.9%	17.5%	17.9%	18.0%
Convenience	3.2%	3.9%	4.6%	5.2%	5.3%

Source: Appendix 3 of Experian Retail Planner Briefing Note 15 (December 2017)

- 3.12 Notwithstanding this, there is no question that the digital revolution and growth of online ('virtual') retailing has significantly impacted on Britain's high streets and sales, as it provides local consumers with convenient and often cheaper alternatives to more traditional shops. Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street (examples being the rationalisation of HMV and GAME stores across the UK, and the loss of Blockbusters). However this does not mean that other comparison goods categories are immune to the impact of the internet, including clothing and footwear. This is illustrated by the survey-derived market shares for SFT and internet shopping across the defined study area and zones (see Section 4).
- 3.13 The impact of the digital revolution is also impacting on how and where people choose to spend their leisure time. For example, instead of visiting the cinema or theatre, consumers can digitally stream to their televisions a vast library of filmed entertainment on demand; and social media, Skype, email and instant messaging are displacing face-to-face interactions. The innovation and development of these alternative digital customer experiences is accelerating, and in the process exacerbating a 'digital divide' between, on the one hand, those well-resourced companies investing and competing in the digital arena, and on the other hand the small independent merchants that comprise most of today's high street communities. Yet the success of firms at both ends of the 'divide' is mutually dependent, and is essential to a successful high street.
- 3.14 Notwithstanding the clear and present impact of the digital revolution on how people shop and 'play', some town centres should be well positioned to benefit from the growth of new retail related services and multichannel retail, particularly through the provision of convenient '*click and collect*' facilities to help drive footfall; whereby customers can browse and order a product on-line, and then collect it from a local store at their convenience. According to research by NEMS Market Research⁹, 48% of online shoppers have at some point made '*click & collect*' purchases (i.e. bought or ordered goods online, but then collected the goods themselves). This not only addresses the major weakness of online shopping, which is that customers may not be at home when their goods are delivered, but also offers an opportunity for the successful adaptation of

⁹ Usage of Click & Collect by internet shoppers. NEMS Market Research (2016)

traditional high street retailing. John Lewis has led the way in this field and Argos has reported that sales through its 'click & collect' service account for circa one-third of the company's total turnover. Amazon also has an agreement with the Co-operative and Morrisons to locate self-service lockers in local stores. According to research by NEMS Market Research Ltd, a wide range of retailers are rated positively in terms of having a good 'click and collect' service, but a few stand out. For example Argos was rated positively by a third of the people who have used a 'click & collect', followed by Tesco (27% rated its service as good), ASDA (15%), John Lewis (13%) and Marks & Spencer (7%). The only 'pure' online retailer that was rated highly was Amazon (7%).

- 3.15 Further to this is the potential for 'showrooms' on the high street, where customers can view and test products in-store before purchasing online. This co-ordinated multi-channel strategy should therefore help to support the vitality and viability of some town centres over time, and help drive the demand for retail space from non-traditional retailers.

Floorspace 'Productivity' Growth

- 3.16 Floorspace 'productivity' (or turnover 'efficiency') growth represents the ability of retailers to absorb higher than inflation increases in their costs over time (such as, for example, rents, rates, service charges and staff costs) to help maintain their profitability and viability. Practically, this is achieved by increasing the amount of sales (revenue) within a given retailer's available floorspace (measured in square feet or metres).
- 3.17 It is standard practice for retail planning assessments to make an allowance for the year-on-year growth in the average sales densities of existing and new (comparison and convenience) retail floorspace. However, there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. Furthermore analysis of past data and trends is complicated by the fact that sales density increases have been affected by changes in the use of retail floorspace over the last 20 years; such as, for example, the growth in out-of-centre retailing; Sunday-trading; longer opening hours; and the very strong growth of retail expenditure relative to the growth in floorspace. Following the recession many retailers struggled to increase or even maintain sales density levels and, together with other financial problems, this resulted in some retailers going out of business.
- 3.18 The table below sets out the latest sales density growth forecasts for comparison and convenience goods floorspace published by *Experian Business Strategies* (EBS), based on predicted changes in retail floorspace over time and after making an allowance for 'non-store' (SFT) retailing.

Table 3.4 Forecast 'productivity' growth rates

	2014	2015	2016	2017	2021	2026	2020-24	2025-36
Comparison	5.4%	5.3%	4.3%	1.3%	0.9%	1.8%	2.3%	2.2%
Convenience	-2.0%	-1.2%	0.7%	-0.1%	-0.1%	-0.2%	0.0%	0.1%

Source: Figures 4a and 4b, Experian Retail Planner Briefing Note 15 (December 2017)

- 3.19 The forecasts show that the scope for sales density growth is limited for convenience goods retailing. This is mainly due to slow growth in sales volumes and limited additions to the floorspace stock following the shelving of major food store expansion programmes by the leading national grocers (i.e. Tesco, Waitrose, Sainsbury's, Morrisons and Asda). Notwithstanding this, the turnover densities of existing food stores in strong trading locations will inevitably be driven upwards where they are serving catchments that are forecast to benefit from strong population and expenditure growth over the short, medium and long term, and particularly where there is limited or no addition to the floorspace stock.

- 3.20 For comparison goods retailing, the trends towards more modern, higher density stores and the demolition of older inefficient space is forecast to continue, resulting in average growth rates of over +2.3% per annum over the next 15-20 years. However, this is still well below the rate seen during the boom of the early years of this century.
- 3.21 The floorspace 'productivity' growth rates forecast by EBS have been used to inform the retail capacity assessment set out in Section 10 of this study. It should be noted however that we consider that existing retailers and floorspace will have the potential to achieve higher annual revenue growth rates to absorb increasing costs in order to remain viable, and this is especially the case where opportunities for additional new floorspace is limited.

Changing Retailer Requirements

- 3.22 The economic downturn, the growth in internet shopping and the continued demand for out-of-centre shopping has resulted in national retailers reviewing and rapidly adapting their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand.
- 3.23 This is probably best illustrated by the changes in the grocery sector over the last 2-3 years. Following a sustained period of growth over almost 20 years up to 2009/10, principally driven by new store openings, the focus for the main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) has now shifted to growing market share through opening new smaller convenience store formats (such as Tesco Express, Sainsbury's Local and Little Waitrose) and online sales. Over this period applications for large store formats have slowed to a virtual standstill and in some cases permissions are not being built out¹⁰. At the other end of the grocery spectrum, the European-led 'deep discount' food operators (namely Aldi and Lidl) are increasing their market shares through new store openings across the UK. This will inevitably have implications for the scale and type of new floorspace required by food stores in the future.
- 3.24 In the non-food sector, those retailers that experienced significant growth up to 2007/08 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high-end and value retailing, have largely struggled to maintain market share. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have significantly reduced their store portfolio in centres across the UK (e.g. HMV, GAME etc.). Although the number of retailer 'casualties' has slowed over the last 12-18 months, there are still a number of traditional high street retailers that have recently been forced into administration, most notably BHS.
- 3.25 Research also shows that there is an increasing polarisation and concentration of retailer demand and investment interest in the larger regional and sub-regional centres (i.e. the 'top 25-50' UK centres as defined by Javelin VenueScore rankings). This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. At the same time, retailer and investment demand is also mainly focussed on the prime retail pitches, with the secondary and tertiary pitches contracting and deteriorating in some centres due to limited demand, smaller shop units and increasing

¹⁰ For example, in 2015 Tesco disposed of some 49 sites with relatively recent permissions for new foodstores, including sites in Ipswich, Basingstoke and Dartford.

vacancies. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

- 3.26 Furthermore, many of the major multiples and traditional high street retailers are changing their store formats and locational requirements. For example, key anchor retailers such as Boots, Next, Mothercare, TK Maxx, John Lewis and Marks & Spencer are actively seeking larger format units to showcase their full product range and to provide an exciting shopper environment backed by the latest (digital) technology. As a result, it is the larger centres and out-of-centre retail parks that are often best placed to meet this demand; as larger units are difficult to accommodate within existing traditional high streets and town centres, particularly historic areas characterised by conservation areas and listed buildings. As a result, some traditional high street retailers are moving out of town centres to retail parks. For example, over recent years Marks & Spencer has closed a number of traditional variety stores on high streets (including in Harlow, Great Yarmouth and Rugby) and opened new M&S Simply Food stores in out-of-centre locations. M&S has also recently announced a further wave of closures for 2018/19. This further underlines the growing demand from multiple retailers for larger format shop units, and the need for town centres to provide a good mix of large modern units to help attract and retain high street retailers, or potentially risk their relocation to new competing shopping destinations as and when leases expire.
- 3.27 These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

Vacancy Levels

- 3.28 The impact of retail closures in town centres due to administration (beginning with Woolworths in 2008, BHS in 2016, and Jaeger in 2017) and portfolio rationalisation (such as Clinton Cards planned closure of 120 stores in 2017/18, as well as the closure of all Banana Republic stores in 2017) has led to a dramatic increase in national vacancy rates.
- 3.29 Experian's figures show that the national average vacancy level (expressed as a proportion of total outlets) more than doubled between 2006 and 2013; from circa 7% to 16%. Although vacancy levels have more recently fallen back to circa 11.2% in 2017, the national average figure 'masks' the reality for different centres and locations, for example:
- Research by the *Local Data Company* shows that there is a significant polarisation in vacancy levels between prime and secondary centres, and between centres in the north and south. The generally more 'healthy' centres, closer to London and the south-east, have vacancy levels of less than 10%, whereas the more challenging conditions in centres such as Blackpool, Grimsby and Hull are resulting in vacancy levels of over 20%.
 - Since 2012¹¹ a significant number of shopping centre and high street retail leases have expired as 25 year leases agreed in the late 1980's to early 1990's and more recent sub-10 year leases all reach maturity. In some cases/locations this has helped retailers with their portfolio rationalisation, as they adjust their store requirements for the new multi-channel environment.
 - In many centres, there can be as many as 25–30% of occupied shops on temporary short-term lets, with little or no rent being paid¹².

¹¹ Jones Lang LaSalle, Property Predictions, 2012.

¹² Sourced from Beyond Retail (2013)

- 3.30 Experience shows that long-term vacancies and concentrations of vacant properties in centres can lead to a '*spiral of decline*', engender feelings of neglect and lack of confidence in town centres, and act as a magnet for crime and antisocial behaviour. Redeveloping and bringing vacant and under-used sites and properties back into use can help stimulate vitality and economic viability, and kick-start local growth¹³. In those cases where vacancies are long-term and units cannot be let, it will be necessary to consider alternative uses and options for redevelopment. This can include temporary uses that ensure town centres and frontages remain active, with the potential to accommodate business start-ups, art studios and galleries, community/youth centres, etc. Another option is '*meanwhile uses/leases*', which can facilitate temporary occupation of empty buildings while a permanent solution is being found. Furthermore, local planning authorities can provide greater flexibility for changes of use in areas with high vacancy levels, particularly secondary frontages, through local plan policies, area action plans and other planning tools.

Trends in Retail-Led Investment and Development

- 3.31 The weak UK retail economy, the low growth in retail sales volumes, high vacancy levels and the lack of traditional development funds are all combining with other factors to create a very difficult climate for new shopping centre development and investment. One of the key impacts at the height of the economic recession was to '*weed out*' some of the more expensive and unviable development schemes that were in the pipeline before the downturn in 2007/08.
- 3.32 *The Shopping Centre Development Pipeline Report* published by the British Council of Shopping Centres (BCSC) shows that the UK experienced, on average, nine new centre openings in each of the first 10 years of the 21st century. However, following the development of circa 260,000 sqm in 2009, 232,000 sqm in 2010 and 280,000 sqm in 2011, 2012 was the first year since records began in 1983 that no significant new shopping centres opened. Notwithstanding this, there are more positive recent signs of new shopping centre investment and development activity, with UK-based and international funds seeking assets (principally in prime and secondary locations) that offer the potential for growth. In terms of new development, three significant schemes opened in 2013 with a total floorspace of circa 140,000 sqm (including Trinity Leeds); the Old Market scheme in Hereford opened in 2014; and in 2015 there were a number of significant openings, including Grand Central in Birmingham as part of the New Street station redevelopment and Friars Walk in Newport. Other shopping centre schemes have opened in centres across the UK since 2015, but none are of the scale witnessed during the 'golden age' of shopping centre development between 1997/98 and 2007/08.
- 3.33 Recent trends suggest that average scheme size is generally smaller than previous schemes (i.e. less than 27,870 sqm), apart from in the larger 'top ranking' cities with the strongest catchment populations and expenditure to support new floorspace. Furthermore, recent developments and schemes in the pipeline have a significantly higher proportion of leisure uses and space than earlier shopping centre developments. For example, Land Securities recently reported that leisure space had grown four-fold in their new development schemes over the last 10 years; as illustrated by their major Trinity Leeds scheme which includes a significant leisure and catering offer. In London, the High Street Quarter scheme in Hounslow Metropolitan Centre will also include a significant food and beverage offer, anchored by a multi-screen cinema, with a reduced retail offer.
- 3.34 Even smaller schemes, such as those in Hereford and Salisbury, are providing between 5-10 restaurant (Class A3) units. Such demand is especially true in those town centres which have wider employment, tourist or other attractions and offer the potential for longer stay shopping. It is apparent that the trend towards more

¹³ London Assembly Economy Committee: Open for Business. Empty shops on London's high streets GLA, March 2013.

eating out and more informal restaurants and catering outlets across town centres is now very much part of new investment and development. This is a trend that clearly has implications for the future planning and development of the Council's main centres and the delivery of a realistic retail vision.

- 3.35 Given that it takes on average over ten years for a town centre scheme to be planned and developed, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Town centre redevelopment is complex and complicated by fragmented ownership in many centres, which acts as a barrier to site assembly and the creation of new development and infill schemes that might provide the right type of larger format retail units to attract expanding retailers. Small units and fragmented ownership are not conducive to accommodating many of today's modern retailer requirements. As a result, local planning authorities will need to take a more proactive role in attracting and/or delivering new investment and development in town centres. This was a key recommendation of the BCSC research '*Enabling Retail Development*' (2015), which identified the following interventions by local authorities based on their case study research:

- **Investor:** Newport, Sheffield, Oldham, Walsall
- **Developer:** Sheffield, Oldham, Bradford, Walsall
- **Masterplanner/site assembly:** Ealing, Hounslow, Newport
- **Owner and management company:** Woking
- **Public Realm delivery:** Hemel Hempstead, Bradford
- **High Street improvements and grants:** Newport, Hounslow, Bradford

- 3.36 Furthermore, the more challenging retail environment means that those shopping locations outside the 'top 25-50' centres that missed the previous (pre-recession) development cycle may face a long wait for new town centre development, as investors look to reduce their exposure and risks. While existing shopping centres may provide the opportunity for asset management by their owners to improve their overall attraction, offer and turnover (such as, for example, through extensions and/or increasing the food, beverage and leisure offer), it can still be problematical and prohibitively expensive to reconfigure units in the more dated early generation shopping centres. In addition, a lack of finance in recent years has severely limited investment in these centres. So, even where there is single ownership and control, activity to create the right type of units for retailers has been restricted. However it is preferable to work with existing schemes, where possible, to avoid simply moving retailers from one scheme to another and creating yet more vacant units.

- 3.37 Even with internet growth, additional floorspace remains one of the primary mechanisms which retailers use to grow profit and if they cannot occupy or adapt existing space, they will often look elsewhere. This means that new retail development solutions are likely to need to become more imaginative in the way in which existing properties (including listed buildings, while mindful of avoiding harm to such heritage assets) are altered in order to help prevent further diversion of trade to out-of-centre locations. Notwithstanding this, the economic rationale for new floorspace in many town centres is much reduced and some commentators¹⁴ argue that the focus will increasingly be on enhancing and updating the existing town centre fabric.

Independents and Markets

- 3.38 Multiples continue to be a powerful force within the retail sector, both as marketable brands, and in their ability to secure prime locations in town centres. However this does not underestimate or undervalue the important

¹⁴ English Heritage (2013), *The Changing Face of the High Street: Decline and Revival*

role of small independent shops¹⁵ and street markets, which help to improve consumer choice and convenience to the communities they serve, as well as generating significant benefits for town centre economies in terms of local employment and income generation. Furthermore, it is widely accepted that a good mix of independent shops and market stalls help to enhance the character, diversity and vibrancy of town centres, preventing the growth of so-called 'clone towns'¹⁶ due to the increasing colonisation of centres by larger chain stores. The homogenisation of the high street is discussed below:

'Is the spread of clone towns and the creeping homogenisation of the high street anything more than an aesthetic blight? We think so. Yes, distinctiveness and a sense of place matter to people. Without character in our urban centres, living history and visible proof that we can in some way shape and influence our living environment we become alienated in the very places that we should feel at home.'
(New Economics Foundation, *Reimagining the High Street*, 2010)

- 3.39 Notwithstanding this, research shows that the number of small shops in the UK has declined in the past decade. This decline has been caused by multiple factors including changes in shopping behaviour, competition from supermarkets, internet shopping and rising costs (including rents and rates).
- 3.40 In terms of street markets, the *2005 Rhodes Report*¹⁷ demonstrated its collective and economic strength. From this report the industry has been successful in demonstrating its national economic value and successive governments have started to value the role of markets as a vibrant and active part of the future of our town centres and the high street. This is illustrated by the NPPF (paragraph 23), which places weight on the need to *'retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive'*.
- 3.41 The *Portas Review*¹⁸ also identified markets as an important factor in the future of successful town centres. This review produced 28 recommendations for reforms and whilst the success (or otherwise) of the Portas Pilots and other interventions are still the subject of debate, recommendation No 17, a national market day, was grasped by the retail market industry. In May 2012 the first *'Love Your Local Market Fortnight'* (LYLM) was rolled out as an annual national celebration of all things positive about retail markets in the UK. The Department for Communities and Local Government (DCLG) have also been very proactive in supporting the positive role of markets in the UK and town centre economies.
- 3.42 Retail markets therefore continue to make a meaningful and important contribution to towns and cities across the UK. The successful markets we see today are those which have embraced change and adapted alongside the town in which they trade; as the demographics of a town change a successful market will reflect this change and continue to cater for and attract the town's residents creating a vibrant and successful market. This will in turn attract visitors from outside the area and increase the value of the market¹⁹.
- 3.43 In summary, providing for the needs of modern retailers in larger format stores, principally through new retail-led developments, whilst maintaining the viability, representation and mix of independent businesses and market stalls is a difficult balancing act for local planning authorities. It will be a greater challenge going

¹⁵ There is no national definition however the Greater London Authority's Town Centres SPG defines 'small independent shops' as a shop with a gross floorspace of 80 sqm or less.

¹⁶ New Economics Foundation (NEF) Clone Town Britain Report (2005 and 2010)

¹⁷ Rhodes N. (2005) *National Retail Market Survey*. Retail Enterprise Network: Manchester Metropolitan University Business School (also known as the 2005 NABMA Study)

¹⁸ The Portas Review: An independent review into the future of our high streets (2011)

¹⁹ Recent research documents supporting the benefits of markets can be found via the following link:
<http://www.nabma.com/publications/research-documents/>.

forward with the threat of internet shopping and a fragile economy in the post-Brexit age, but it is vitally important that the diversity of a centre's offer is not undermined by the new retail brands.

Impact of Out-Of-Centre Retailing

- 3.44 Alongside the dramatic growth in online shopping and sales over the last decade, it is apparent that the appetite from investors and operators for new retail and leisure floorspace in out of centre locations has not diminished.
- 3.45 Research²⁰ shows that there has been a significant shift of institutional retail investment away from town centres over the last 20 years. In 1993, the proportion of investment held out of town was less than a fifth of that in town centres; today the value of property owned out of town has overtaken that held in town centres.
- 3.46 Larger format units in out-of-centre shopping parks are increasingly attractive locations for more traditional high street retailers, with the benefits of good accessibility, lower costs and ample surface car parking compared with town centres. Out-of-centre retailing also accounts for a significant proportion of existing and new retail floorspace and sales in the UK. For example research has highlighted the fact that of the new retail developments approved since the NPPF was published in March 2012, 72% were in out of town locations, 16% were edge of centre and just 12% were in town centres.
- 3.47 Although planning policies and more restrictive conditions on what goods can and cannot be sold from some retail warehouses and parks has slowed down the growth of out-of-centre retailing to a degree, the sector continues to mature and move away from 'bulky' goods²¹ retailing to the provision of larger stores selling fashion and homewares that compete directly with the high street. Examples include Next at Home (which now includes a significant proportion of fashion sales), John Lewis at Home and Outfit (which includes the Arcadia brands in one store, including Dorothy Perkins, Topshop, Burton, Wallis, etc.).
- 3.48 Continuation of this trend will further challenge the future vitality of many high streets as retailers choose edge and out of centre locations ahead of town centres. The impact of these changes will also affect centres differently depending on their function and the future growth in their catchment populations and expenditure. For many towns, the simple fact is that in the future they will require a smaller, more concentrated retail core repositioned for future consumer and retailer needs, and not focused on the past. This will further reinforce the polarisation trend already being witnessed. The impact is likely to be felt across all centres to a greater or lesser extent, manifested through high vacancy rates, falling rent levels, decreasing footfall, weakening multiple retail offer and, potentially, a worsening town centre environment.

Summary

- 3.49 This section has illustrated that existing floorspace in town centres faces a myriad of challenges. These will continue to grow over the short, medium and long term. This notwithstanding, for the centres within the Dorset Councils Partnership area to perform strongly they will need to embrace the new dynamics and build in resilience to adapt seamlessly to future changes where necessary. There is still a role for existing floorspace and physical 'store based' retailing in town centres.

²⁰ Property Data Report 2012, sourced from English Heritage Report (2013), The Changing Face of the High Street: Decline and Revival

²¹ 'Bulky' goods retailing is generally defined as comprising DIY goods, furniture and floor coverings, major household appliances and audio-visual equipment.

- 3.50 There are positive signs that the UK is emerging from the shadow of the longest and deepest economic downturn in living memory, but it is clear that our town centres and high streets post-recession are under pressures to simply retain retail businesses, let alone attract new investment and development.
- First, although the economy in general, and retail sector in particular, is forecast to experience growth over the short to medium term at least, there are risks to these growth forecasts; not least the slowdown in global economies, an increase in interest rates and the potential fallout from Brexit and other global uncertainties arising from international politics.
 - Second, the growth of online shopping is impacting on the vitality and viability of many of Britain's centres and high streets.
 - Third, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, the market appetite for new and extended shopping facilities in out-of-centre locations shows no signs of slowing. The lack of available, suitable and viable sites in town centres – and particularly historic centres - to meet the demands of modern retailers and commercial leisure operators for larger format units will inevitably result in an increase in new out-of-centre applications and/or applications to widen 'bulky goods' conditions on existing retail parks.
- 3.51 Within the Dorset Councils Partnership area, there will be a need to build in resilience to the changes in shopping habits, which are likely to move away from solely being retail led locations to those which offer a wider range of retail, leisure, cultural and other amenities. This is to encourage increased dwell times and to create more purpose in frequenting centres.
- 3.52 These trends, and others, are also placing pressures on retail growth and market demand in many centres, particularly the smaller secondary centres and market towns outside the 'top 25-50' shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers. As a result, the share of non-food retail sales conducted through town centre shops has declined; from 64% in 2002 to just over 40% by 2013. Indeed research predicts that by 2020, the impact of declining in-store sales will result in a 31% reduction in high street stores²².
- 3.53 As a result a far more uncertain future awaits the next wave of new retail investment and development. The evidence suggests that:
- At one end of the spectrum the larger, more dominant 'top 25-50' **cities and towns** should strengthen their competitive position. Because of their scale and catchment populations they will continue to attract market interest from high profile domestic and international retailers seeking space, as well as from commercial leisure operators.
 - At the other end of the spectrum the smaller **local and neighbourhood centres** will be less affected. They are principally meeting the everyday retail (food), service and community needs of their local ('walk-in') resident catchment populations. It will therefore be important for local planning authorities to protect the important offer, role and function of these smaller centres.
 - It is the **medium-sized towns** that occupy the middle ground that are increasingly being squeezed by the dynamic shifts in retailer demand and investment. Historically, such towns have had a reasonably large comparison shopping function, but this is beginning to shrink back because the demand from multiples is slowing and the space offered is often of the wrong size and configuration, and in the wrong location to meet today's retailer requirements. The challenge for local planning authorities will therefore be how to revitalise and regenerate these centres, looking beyond retail as a key driver for growth.

²² Javelin Group (October 2011), 'How Many Stores Will We Really Need?'

- 3.54 Notwithstanding these threats, industry experts still predict that the demand from major retailers for new physical space in the right locations with strong catchments will continue, as it still remains one of the primary mechanisms for retailers to 'reach' their customers, to grow their businesses and to increase market share and profitability. Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities). This is because there is limited new retail floorspace in the pipeline in town centres and, in any case, it can take a long time to deliver new development on complex town centres sites.
- 3.55 Therefore those shopping locations that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. preferably prime shopping locations, with good accessibility, etc.) and having the right size, format and specification to meet the needs of modern retailers. Due care and attention will also need to be paid to ensuring that the new floorspace and tenants complement rather than compete with the centre's existing offer, and strengthen rather than weaken the existing pedestrian circuit so as to generate the maximum benefits for the centre's overall vitality and viability.
- 3.56 In this context, it is clear that the 'top 25-50' prime centres and shopping locations in Britain should continue to flourish once the economy recovers. The greatest challenge facing local planning authorities will be how to revitalise the fortunes of struggling small and medium sized centres and market towns that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.
- 3.57 This provides the important background and context for assessing and understanding the potential for new retail investment and development in the three local authority areas and centres over the short, medium and long term.

4 CATCHMENT (STUDY) AREA DEFINITION & SHOPPING PATTERNS

- 4.1 This section first defines the catchment/study area that provides the basis for the analysis of current shopping patterns and leisure preferences across the three local authorities and a wider area. This also helps to inform the analysis of market shares for all centres, stores and shopping facilities that will underpin the quantitative needs ('capacity') assessment set out in Section 19 to this report.

Study Area and Zones

- 4.2 The definition of an appropriate study (catchment) area is an important starting point for any retail and town centre assessment. In this case the study area has been defined using wards that make up the three Council areas, as well as outlying areas; including small parts of the surrounding local authority areas (namely East Devon District Council, South Somerset District Council and Wiltshire Council) (see **Appendix 1**).
- 4.3 The study area has been divided into 12 zones based on ward geography, as follows:

Table 4.1: Study Area – Zones

Zone	Ward Name/Code
1	Tophill West (E05003775); Underhill (E05003776); Tophill East (E05003774)
2	Weymouth West (E05003783); Weymouth East (E05003782); Westham North (E05003779); Wyke Regis (E05003784); Westham West (E05003780); Melcombe Regis (E05003771); Radipole (E05003773); Westham East (E05003778); Wey Valley (E05003781); Preston (E05003772); Littlemoor (E05003770)
3	Chickerell & Chesil Bank (E05010587); Upwey and Broadwey (E05003777); Winterborne St. Martin (E05010602)
4	Burton Bradstock (E05010585); Trinity (E05003487); Netherbury (E05010596); Chideock & Symondsburry (E05010588); Broadwindsor (E05010584); Lyme Regis & Charmouth (E05010594); Bridport South (E05010582); Bridport North (E05010581)
5	Dorchester West (E05010592); Dorchester North (E05010590); Dorchester South (E05010591); Dorchester East (E05010589)
6	Lulworth and Winfrith (E05009535); Broadmayne & Crossways (E05010583); Wool (E05010754)
7	Cerne Valley (E05010586); Piddle Valley (E05010597); Puddletown (E05010598)
8	Maiden Newton (E05010595); Beaminster (E05010580); Frome Valley (E05010593)
9	Queen Thorne (E05010599); Yetminster & Carn Vale (E05010603); Lydden Vale (E05010007); Blackmore (E05009997); Blackmoor Vale (E05006820); Milborne Port (E05006841); Sherborne West (E05010601); Sherborne East (E05010600)
10	Sturminster Newton (E05010012); The Stours & Marnhull (E05010014); Mere (E05008378); Gillingham Rural (E05010003); Motcombe & Bourton (E05010008); Gillingham Town (E05010004)
11	Nadder and East Knoyle (E05008380); Tisbury (E05008401); The Beacon (E05010013); Shaftesbury West (E05010011); Shaftesbury East (E05010010)
12	Abbey (E05009996); Bulbarrow (E05010002); Lower Tarrant (E05010006); Hill Forts (E05010005); Riversdale & Portman (E05010009); Blandford Hilltop (E05009999); Blandford Old Town (E05010001); Blandford Central (E05009998); Blandford Langton St. Leonards (E05010000)

- 4.4 These zones provide the sampling framework for the household telephone interview survey (HTIS). This zone-by-zone approach also enables more detailed analysis of shopping patterns, market shares and expenditure flows both within and outside the Study Area for the purpose of the retail capacity assessment, in accordance with good practice.
- 4.5 For the purpose of this assessment it has been assumed that Zones 1-2 are broadly representative of the Weymouth and Portland Borough area; Zones 3-9 broadly represent the West Dorset District area; and Zones 10-12 are equivalent to the North Dorset local authority area. Clearly parts of these zones lie outside the local

authority areas (i.e. Zones 4, 6, 9, 10 and 11), and this has been taken into account by our population, expenditure and capacity forecasts.

Household Telephone Interview Survey & Market Share Analysis

- 4.6 NEMS Market Research was commissioned to carry out a HTIS across the defined study area and zones in July 2017. The questionnaire was designed by Carter Jonas (CJ) in collaboration with the three Councils. In total, some 1,200 interviews were conducted across twelve zones. This involved structured interviews by telephone with the person responsible for the main household shop.
- 4.7 A number of measures were put in place by NEMS to ensure each sample was representative of the profile of the person responsible for shopping in the household. Responses across the study area were also weighted by the population in each zone to ensure that the results of respondents in more sparsely or heavily population areas were not under or over represented in terms of the market share assessment. In addition, these results were further filtered to remove 'null' responses (including "don't know" responses). This is a standard approach that helps to ensure the survey results provide a robust and realistic picture of shopping and leisure patterns. The full 'weighted' survey results are set out in **Appendix 25** (Volume 2), along with the survey methodology and questionnaire.
- 4.8 The survey results help to identify broad patterns and preferences for different types of retail (convenience and comparison goods) shopping purchases and online shopping, as well as leisure use across the study area. The key findings are used to inform the baseline market share analysis²³ and the centre/store turnover estimates that underpin both the quantitative and qualitative needs ('gap') assessment.

Convenience Goods – Market Share Analysis

- 4.9 Convenience goods²⁴ retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.). The survey-derived market share (%) analysis for all convenience goods shopping is set out in **Table 1 (Appendix 5)**. It should be noted that for this stage of the analysis the market shares for both convenience and comparison goods retailing include expenditure on 'Special Forms of Trading'²⁵ (SFT - including internet sales), but exclude 'null' responses in accordance with good practice.
- 4.10 The overall market shares in Table 1 have been derived from the analysis of the responses as to where people normally shop for their main ('bulk') and 'top up' grocery purchases. In order to avoid the market share analysis of food shopping patterns being 'skewed' by larger superstores and food stores in the study area, the survey also asked respondents where else they normally shop (if anywhere) for their 'main' and 'top up' purchases in addition to the first store identified. The market shares for these different types of food shopping are set out in detail in **Tables 2-5 (Appendix 5)**.

²³ It is common practice in retail assessments to deduct special forms of trading (i.e. purchases over the internet, mail order shopping and market stalls) from average expenditure per capita figures at the outset according to national forecasts derived from Experian Business Strategies. Internet shopping and special forms of trading have therefore been filtered out from the survey results before undertaking the market share assessment.

²⁴ For the purpose of this retail assessment 'convenience goods' and 'food' shopping have the same meaning.

²⁵ A more detailed explanation of SFT is set out in Section 3

- 4.11 The responses for 'primary' and 'secondary' food shopping purchase have then been merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. These judgements have been informed by Question 9 of the household survey, which identifies the proportion of expenditure spent on main food shopping. In this case we have applied a reasonable and robust weighting of 60% for main 'bulk' shopping; 15% for secondary main 'bulk' shopping; 15% for primary 'top-up' shopping; and 10% for secondary 'top-up' shopping.
- 4.12 The key findings of the market share analysis are briefly described below.
- 4.13 In terms of the market share of **special forms of trading** (SFT), and principally internet shopping, **Table 1 (Appendix 5)** shows that the share of all food shopping across the study area (i.e. zones 1-12) is 4.9%. The market shares vary for the different zones that broadly make up the three local authority areas as follows:
- In the West Dorset district area (zones 3-9) SFT accounts for 5.8% of all convenience purchases;
 - In Weymouth & Portland (zones 1-2) SFT accounts for 2.6%; and
 - In North Dorset (zones 10-12) SFT accounts for 5.2%.
- 4.14 To place these local SFT market shares in context, Experian's latest *Retail Planning Briefing Note 15* (RPNB 15, December 2017) indicates that the national average for non-store (SFT) convenience goods retail sales is 10.8% in 2017 (see Section 3). This is significantly higher than the market shares identified for the study area zones. A number of factors may explain this lower than average market share at the local level. For example, it may reflect an older age profile who have more traditional food shopping patterns and are less reliant on the internet to meet their shopping needs; and we consider that this is most likely the case for the three local authority areas surveyed. Alternatively, the lower than average market shares for internet shopping in certain locations may reflect the good provision/choice and convenient access to (physical) food stores, compared with more limited access to internet food shopping/deliveries, and the coverage of the 'internet infrastructure'. In this case there would therefore appear to be potential for SFT market penetration to increase in the future as online grocery shopping becomes more popular, accessible and convenient. If this was to occur, then it would reduce the residual expenditure available to support the need ('capacity') for new ('physical') retail floorspace over the forecast period (see **Section 19**).
- 4.15 Turning to the market share analysis for the main centres and stores in the three local authority areas, **Table 1 (Appendix 5)** shows that they are achieving an overall convenience goods market share ('retention level') of 80.4% within the study area. This represents a relatively strong 'retention level' in our experience. **Table 4.2** below summarises the market shares for the main food and convenience stores within the three Council areas and across the wider study area.

Table 4.2: Convenience goods market shares for key centres in the Council areas

Council Area	Centre	Total Study Area	Council Area Only
West Dorset Zones	Dorchester TC	5.0%	9.4%
	Bridport TC	2.0%	4.0%
	Sherborne TC	1.3%	2.7%
	Lyme Regis TC	0.8%	1.5%
	Beaminster Local Centre	0.5%	1.0%
	Other/Local Centres	2.2%	4.2%
	Out of Centre	17.0%	32.0%

	WEST DORSET SUB TOTAL:	28.9%	54.8%
OTHER CENTRES OUTSIDE WEST DORSET:		66.2%	39.4%
SFT:		4.9%	5.8%
TOTAL:		100.0%	100.0%
Weymouth & Portland Zones	Weymouth TC	1.7%	6.5%
	Portland, Easton Local Centre	2.7%	12.6%
	Portland, Fortuneswell Local Centre	0.3%	1.5%
	Other/Local Centres	0.6%	2.7%
	Out of Centre	19.6%	70.8%
	WEYMOUTH & PORTLAND SUB TOTAL:	24.9%	94.0%
OTHER CENTRES OUTSIDE WEYMOUTH & PORTLAND:		70.2%	3.4%
SFT:		4.9%	2.6%
TOTAL:		100.0%	100.0%
North Dorset Zones	Gillingham TC	9.0%	26.6%
	Blandford Forum TC	3.4%	11.7%
	Shaftesbury TC	4.4%	14.2%
	Sturminster Newton TC	1.6%	4.8%
	Stalbridge	1.1%	0.3%
	Other/Local Centres	0.4%	0.9%
	Out of Centre	6.8%	22.1%
	NORTH DORSET SUB TOTAL:	26.7%	80.7%
OTHER CENTRES OUTSIDE NORTH DORSET:		68.4%	14.3%
SFT:		4.9%	5.2%
TOTAL:		100.0%	100.0%

Source: Table 1, Appendix 5

West Dorset

- 4.16 As the table above shows, West Dorset's main centres and stores are achieving the highest overall market share of 28.9% within the study area. However the local authority as a whole has a relatively low retention rate of only 54.8% compared with North Dorset (80.7%) and Weymouth and Portland (94.0%). We consider that this lower 'retention' level is probably explained by the wider geographic area covered by the district's defined zones and its population distribution, as well as the proximity and convenience of competing stores/shopping locations outside of the district area. For example whilst zone 3 is within the West Dorset area, some of the outlying areas are situated close to the boundary of Weymouth & Portland Borough. The results indicate that whilst this zone accounts for 24.3% of the overall market share within the West Dorset area, there is a 'leakage' of 66.3% to Weymouth & Portland Borough. The lower 'retention' level may also indicate a 'gap' in the district's larger food store offer, and we consider this in more detail in our health check and capacity assessments.

- 4.17 In summary:

- **Dorchester** acts as the main food and convenience shopping destination in the district, with a market share of 9.4% within the West Dorset area and 5.0% across the entire study area.
- The other main town centres of **Bridport** (4%), **Sherborne** (2.7%), **Lyme Regis** (1.5%) and **Beaminster** (1%) are achieving lower market shares, which reflects the more limited scale and range of the food and

convenience offer in these centres (see the health checks for each centre). In Lyme Regis, for example, the lower market share reflects the fact that there are no large supermarkets in the centre providing a full range of food and convenience goods.

- The most popular in-centre food store in West Dorset is **Waitrose in Dorchester**. The survey results show that it is achieving a market share of 5.9% in the West Dorset area and 3.1% across the entire study area.
- **Waitrose in Bridport** is also capturing a higher market share of 2.9% within the West Dorset area.
- The relatively low market shares for the District's main centres is also explained by the competition from large **out-of-centre** food stores. The survey results shows that out-of-centre stores in the West Dorset Council area account for 32.0% of all available expenditure in the defined District zones, and 17.0% of all study area expenditure.. The most popular out-of-centre food stores accounting for some 26.2% of all expenditure in the West Dorset area are:
 - Tesco at Weymouth Avenue, Dorchester (10.7%);
 - Morrisons at West Bay Road, Bridport (6.3%);
 - Sainsbury's at Ludbourne Road, Sherborne (4.6%);and
 - Lidl at The Grove, Dorchester (4.6%).

4.18 As described above, the survey results indicate that the market share of **online sales** is relatively low at 5.8%.

4.19 In our view the 'leakage' of expenditure from West Dorset to stores outside of the three Council areas is higher than would normally be expected at 22.5%, and is significantly higher when compared to the leakage outside of the local authority areas from North Dorset (11.4%) and Weymouth & Portland (0.2%). This 'leakage' from West Dorset to centres outside of the study area is predominantly to Yeovil (6.4%), Wincanton (4.2%) and Crewkerne (2.5%).

Weymouth & Portland

4.20 Weymouth & Portland's main centres and stores have the lowest overall market share of 24.9% within the study area. This is to be expected considering the borough's location to the far south of the study area. Notwithstanding this, it achieves the highest 'retention' level within the three Council areas of 94.0%.

4.21 In summary:

- **Easton Local Centre** (Portland) has the highest market share for in-centre stores in the local authority area (12.6%). This is a result of the large Tesco supermarket which retains a market share of 10.9% in Weymouth & Portland.
- **Weymouth Town Centre** has a market share of just 6.5% in the defined Council area and 1.7% across the entire study area. This is explained by the lack of large format superstores within the centre. For example, the Tesco Metro store is achieving a market share of 2.0%, reflecting its role in meeting the more 'top-up' shopping needs of the population rather than main food shopping. Overall, in-centre stores retain only 23.2% of expenditure within Weymouth & Portland.
- In contrast the Borough's **out of centre stores** are achieving a market share of 70.8% of convenience expenditure in the borough area (or 19.6% of all study area expenditure). This mainly reflects the significant out of centre food store provision in Weymouth:
 - Asda at Newstead Road, Weymouth (21.4%);
 - Morrisons at Dorchester Road, Weymouth (16.8%);
 - Sainsburys at Mercery Road, Weymouth (13.8%); and
 - Aldi at Jubilee Retail Park, Weymouth (9.7%).

- 4.22 This strong out-of-centre provision also probably explains the relatively low market share for online sales (2.6%) and low levels of 'leakage' to competing stores outside of the three local authority areas (0.2%).

North Dorset

- 4.23 North Dorset's main centres and stores are achieving a 'retention level' within the broadly defined Council area of 80.7% and 26.7% across the entire study area. In summary:
- **Gillingham** is achieving the highest market share of 26.6% within the North Dorset area, followed by Shaftesbury (14.2%), Blandford Forum (11.7%) and Sturminster Newton (4.8%).
 - **Stalbridge** is achieving a market share of just 0.3% within the North Dorset area, which reflects the scale and range of its overall food and convenience offer (see health check assessment, Section 10).
 - The most popular and best performing **in-centre food stores** measured in terms of their market shares within the North Dorset area are:
 - Tesco at Christy's Lane, Shaftesbury (13.2%);
 - Waitrose at Chantry Fields, Gillingham (10.5%);
 - Lidl at Newbury, Gillingham (9.5%);
 - Morrisons at West Street, Blandford Forum (6.3%); and
 - Asda at Station Road, Gillingham (5.8%).
 - North Dorset's **out of centre food stores** are achieving a 22.1% market share in the North Dorset Council area and 6.7% across the wider study area. The largest and most popular out of centre store is Tesco at Stour Park, Blandford Forum, which has a 19.9% market share in defined North Dorset area.
- 4.24 Whilst the survey results indicate a relatively low market share for online sales (5.2%) compared with the Experian national average, there is a higher level of 'leakage' to other centres and stores outside of the Council area (11.4%); principally to Salisbury (1.5%), Poole (1.3%) and Wincanton (2.9%).

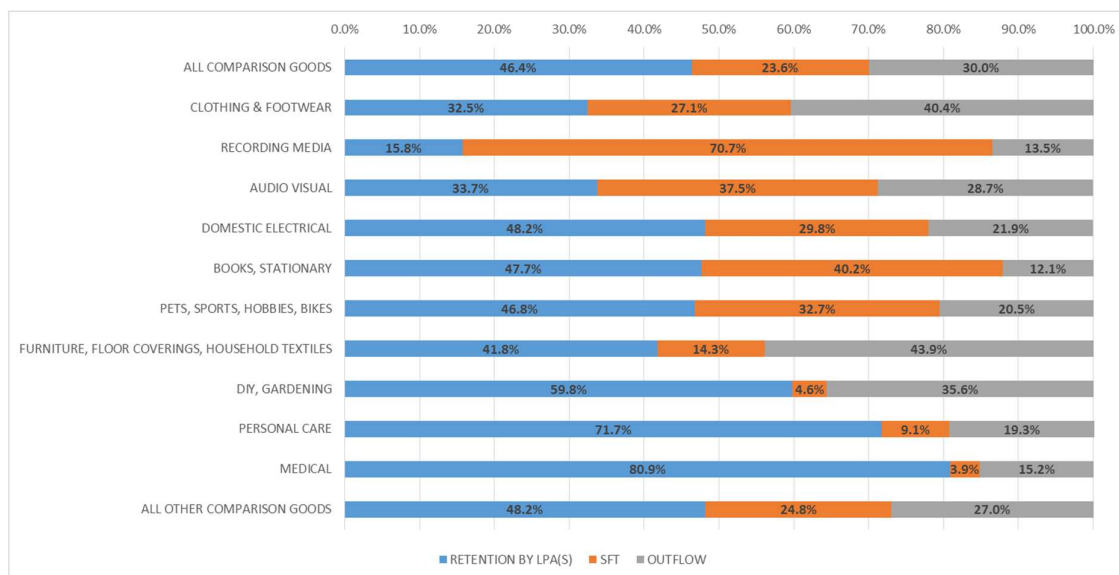
Comparison Goods – Market Share Analysis

- 4.25 Comparison goods²⁶ are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods. The household survey comprised questions on the main groupings of non-food expenditure, as defined by Experian in the latest Retail Planning Briefing Note 15, including: clothing and footwear, recording media, electrical goods, books, furniture and carpets, DIY and garden products, medical goods and other non-food goods.
- 4.26 **Table 1 (Appendix 6)** shows the market shares (%) for all comparison goods shopping purchases made both within and outside the study area. These total market shares have been informed by the shopping patterns for the different types of comparison goods expenditure set out in Tables 2-11 (**Appendix 6**). The market share analysis (%) takes account of the distribution and weight of spend (£) by households on the different comparison goods categories. This ensures that the resultant shares are not 'skewed' by any particular comparison goods expenditure category. This is a standard approach for retail assessments. As for the analysis of convenience goods, the market shares include expenditure on special forms of trading (SFT) but exclude all 'null' responses.

²⁶ Please note that comparison goods and non-food shopping have the same meanings.

- 4.27 **Table 1 (Appendix 17)** shows that SFT's market share of all non-food shopping across the total study area is 23.6%. This market share varies from 22% for Weymouth and Portland, 23.1% for North Dorset and 24.5% for West Dorset. In comparison, Experian's latest Retail Planner Briefing Note 15 shows that the national average market share for non-store (SFT) comparison goods retail sales is 19.7% in 2017 (see **Section 3**). While SFT market shares for the study area and local authority areas are above the national average, there is potential for SFT to increase its market share penetration in the future; for example, Experian forecast average SFT non-food market shares will increase to 22.5% by 2021 and 24% by 2036. If the SFT market share for the study area was to increase by the same rate (proportionally) as forecast by Experian, then it will reduce the residual expenditure available to support the need ('capacity') for new ('physical') retail floorspace over the forecast period to 2036 (see Section 19).
- 4.28 Turning to the market shares for the main centres and out-of-centre stores and shopping facilities in the study area, **Table 1 (Appendix 6)** shows that they are achieving an overall 'retention level' of 46.4% across the whole study area. Within the broadly defined local authority areas, West Dorset is achieving the greatest market share (20.2%) across the study area compared to the other two local authority areas. However Weymouth town centre, situated within Weymouth & Portland Borough, has the highest comparison goods market share (11.9%) when compared against all of the three Council areas' town centres. North Dorset has the lowest market share within the study area (10.8%).
- 4.29 Figure 4.1 below shows the 'retention' of comparison goods expenditure by the three local authorities in the study area, the market share of SFT and the 'leakage' ('outflow') of expenditure to competing centres, stores and shopping facilities located outside the three Council areas.

Figure 4.1: Comparison goods market shares for the study area (Zones 1-12)



- 4.30 The figure shows that the highest proportions of expenditure 'outflow' are in the categories of 'furniture, floor coverings, household textiles' (43.9%) and 'clothing & footwear' (40.4%). In contrast 'medical' (80.9%), 'personal care' (71.7%) and 'DIY/gardening' (59.8%) have the highest expenditure retention rates. Online shopping mainly dominates the 'recording media' (70.7%) and 'books and stationery' (40.2%) categories.
- 4.31 **Table 4.3** below sets out the market shares for the main centres and stores within the three Council areas and across the study area.

Table 4.3: Comparison goods market shares for key centres in the Council Areas

Council Area	Centre	Total Study Area	Council Area
West Dorset	Dorchester TC	11.6%	19.4%
	Bridport TC	4.6%	8.9%
	Sherborne TC	2.1%	3.9%
	Lyme Regis TC	0.4%	0.8%
	Beaminster Local Centre	0.2%	0.3%
	Other/Local Centres	0.2%	0.4%
	Out of Centre	1.2%	2.2%
	SUB TOTAL:	20.2%	35.9%
OTHER CENTRES OUTSIDE WEST DORSET:		56.2%	39.6%
SFT:		23.6%	24.5%
TOTAL:		100.0%	100.0%
Weymouth & Portland	Weymouth TC	11.9%	48.8%
	Portland, Easton Local Centre	0.4%	2.0%
	Portland, Fortuneswell Local Centre	0.0%	0.0%
	Other/Local Centres	0.4%	1.6%
	Out of Centre	2.8%	9.3%
	SUB TOTAL:	15.4%	62.0%
OTHER CENTRES OUTSIDE WEYMOUTH & PORTLAND:		61.0%	16.0%
SFT:		23.6%	22.0%
TOTAL:		100.0%	100.0%
North Dorset	Gillingham TC	1.8%	5.5%
	Blandford Forum TC	4.5%	14.5%
	Shaftesbury TC	2.9%	9.6%
	Sturminster Newton TC	1.1%	2.9%
	Stalbridge	0.2%	0.0%
	Other/Local Centres	0.0%	0.1%
	Out of Centre	0.3%	1.2%
	SUB TOTAL:	10.8%	33.9%
OTHER CENTRES OUTSIDE NORTH DORSET:		65.6%	43.0%
SFT:		23.6%	23.1%
TOTAL:		100.0%	100.0%

Source: Table 1, Appendix 6

- 4.32 Looking at expenditure retention for the main centres, the following key market shares have been identified.

West Dorset

- 4.33 The survey indicates that West Dorset's main centres and stores are achieving a 20.2% market share within the defined study area, increasing to 35.9% within the defined West Dorset Council area only. In summary:

- **Dorchester town centre** is the most popular shopping destination in West Dorset with a market share of some 19.4% in the West Dorset area and 11.6% across the wider study area. Notwithstanding this, Dorchester has a relatively low retention rate within its defined district area compared with Weymouth, for example, within its local authority area; although the two centres do share similar market shares across

the whole study area. This is likely to be a result of Dorchester drawing from a wider more rural catchment area, whereas Weymouth draws from a more localised more urban residential catchment, supplemented by its more sizeable visitor/tourist market.

- **Bridport** is the next most popular shopping destination, with a market share of 8.9% in West Dorset.
- **Out of centre** stores have a market share of just 2.2%, reflecting the more limited out of centre comparison goods provision across the District.

4.34 Around 31.4% of expenditure from within the West Dorset area '**leaks**' to locations outside of the three Council areas; principally to Yeovil (14.5%), Poole (5.4%) and Exeter (3.2%).

Weymouth & Portland

4.35 Although the main centres and stores in the Weymouth & Portland Council area are achieving a relatively low market share of 15.4% within the study area, it has the highest market share within its defined broadly local Council area (62.0%) in comparison with West Dorset (35.9%) and North Dorset (33.9%). In summary:

- **Weymouth town centre** achieves a 48.8% market share within the borough and 11.9% within the wider study area.
- **Out of centre** shopping locations have a market share of 9.3%. The Jubilee Retail Park in Weymouth is the main attraction, with a market share of 7.0%.

4.36 In comparison to the other two Council areas, there is little expenditure '**leakage**' to locations outside of the three local authority areas (8.2%). This main leakage is to Poole (3.7%) and Yeovil (2.2%).

North Dorset

4.37 The main centres and shopping locations in North Dorset have the lowest comparison goods market shares within the overall study area (10.8%) and the Council area (33.9%) compared with the other two local authorities. In summary:

- **Blandford Forum** town centre has a relatively strong market share of 14.5% within North Dorset, and 4.5% within the entire study area.
- The other main comparison goods shopping destinations in North Dorset are **Shaftesbury** (9.6% market share within the defined local authority area), **Gillingham** (5.5%) and **Sturminster Newton** (2.9%).

4.38 Notwithstanding this, the survey results indicate that there is a high level of 'leakage' from the North Dorset area to locations outside of the three Council areas (41.7%); principally to Poole (16.2%), Salisbury (8.8%), Yeovil (7.8%) and Bournemouth (2.4%). This reflects the more limited scale and range of comparison goods offer in North Dorset's main centres, their relative role and function in the network and hierarchy of centres; and the strong competition and ease of access to larger centres and shopping facilities outside the local authority area.

5 TOWN CENTRE HEALTH CHECKS: METHODOLOGY

- 5.1 Sections 5-18 provide detailed health check assessment for the Dorset Councils Partnership's main centres, as follows:

Table 5.1: Main town centres within each Local Authority area.

Local Authority Area	Centre
North Dorset	Blandford Forum (Section 6); Gillingham (Section 7); Shaftesbury (Section 8); Sturminster Newton (Section 9); Stalbridge (Section 10)
Weymouth & Portland	Weymouth (Section 11); Portland – Easton (Section 12);
West Dorset	Dorchester (Section 13); Bridport (Section 14); Sherborne (Section 15); Lyme Regis (Section 16); Beaminster (Section 17); Poundbury (Section 18);

- 5.2 Health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres, and informing both plan-making and decision-taking at the local level.
- 5.3 In accordance with the PPG (paragraph 005 Reference ID: 2b-005-20140306), there are a number of indicators that are widely used (where the information exists) to help assess and monitor the overall health and performance of centres. Some of the indicators include:
- the diversity of uses (e.g. retail and services offer);
 - proportion of vacant street level property;
 - commercial yields on non-domestic property;
 - customers' views and behaviour;
 - retailer representation and intentions to change representation;
 - commercial rents;
 - pedestrian flows;
 - accessibility;
 - perception of safety and occurrence of crime; and
 - state of town centre environmental quality.
- 5.4 In this case the most reliable KPIs have been gathered (where possible) for the centres to help inform the assessment of their overall strengths and weaknesses in in terms of their retail and leisure provision, the opportunities for new sustainable development and growth, and any potential current and future threats to their overall vitality and viability. We have referred to a number of datasets and research to help assess the relative vitality and viability of the Councils' main town centres, as referenced throughout the report. The general methodology is set out below.

Engagement of Key Stakeholders

- 5.5 As part of undertaking the town centre health checks, we have been asked by the Councils to contact a number of key stakeholders. The exercise was undertaken during the site visits and/or telephone calls. Carter Jonas sought to contact all organisations/ representatives on the list, in the time given. The table below shows the key stakeholders with whom a successful engagement was held.

Table 5.2: Stakeholder Engagement

Settlement	Contact
North Dorset	
Blandford Forum	Nocturin Lacey-Clarke (Town & District Councillor); Linda Scott Giles (Town Clerk)
Gillingham	David Walsh (Portfolio Holder for Planning (NDDC) and Councillor); Julie Hawkins (Clerk to the Planning Committee); David Beaton (Neighbourhood Plan Chair); Mike Gould (Town & District Councillor); Belinda Ridout (Mayor of Gillingham and Town & District Councillor); Barry Von Clemens (Town Councillor)
Shaftesbury	Clive Carter (Director of Shaftesbury Task Force); Brie Logan (Town Council Business Manager);
Sturminster Newton	Christopher Wilkins (Town Clerk)
Stalbridge	Graham Carr-Jones (Leader of the Council (NDDC) and Chairman of the Town Council)
Weymouth & Portland	
Weymouth	Nigel Reed (BID Manager); Claudia Moore (Councillor and Weymouth BID)
Portland	Andy Matthews (Portland Community Partnership)
West Dorset	
Dorchester	Adrian Stuart (Town Clerk); Susie Hosford (Mayor of Dorchester and Town & District Councillor)
Bridport	Caroline Meredith (Chamber of Commerce); Dave Rickard (Town & District Councillor); Rosie Mathisen (Neighbourhood Plan Group); Bob Gillis (Town Clerk); Daryl Chambers (Town Surveyor)
Sherborne	Trevor Savage (Town Clerk); Sue Smith (Chamber of Commerce Chairman)
Lyme Regis	Brian Larcombe (Town Councillor); Mark Green (Deputy Town Clerk); Steve Miller (Deputy Mayor and Town Councillor); John Broom (Town Councillor)
Beaminster	Chris Turner (Council Chairman/Town Councillor); Christine Bright (Town Clerk)
Poundbury	Simon Conibear (Estate Director)

- 5.6 A workshop was hosted by Carter Jonas with key stakeholders as well as officers from all three Councils. This was held at Weymouth & Portland Borough Council offices on 9th January 2018. As part of the workshop we presented on the draft findings of the report, in order to discuss and seek agreement on the key challenges and issues identified in the main town centres as well as the key opportunities. The workshop aimed to ensure that the views and opinions of stakeholders had not been missed as these are recognised as being critical to the overall recommendations and conclusions. The workshop was attended by around 30 participants, including local stakeholders and officers.

Retail Composition & Diversity of Uses

- 5.7 The town centre health check assessments have been informed by analysis of Experian Goad reports for each town centre. Where Experian Goad reports are not available for specific centres, Carter Jonas has carried out site visits, audits and observations of the respective centres to inform our health check assessments.
- 5.8 In brief, the Goad reports set out the number and proportion of units in each use classification across the centres (i.e. convenience, comparison and service uses, and vacant units). They allow for benchmarks with the UK national average for all circa 2,000 centres and shopping locations covered by Experian Goad. It

should be noted that 'services' as defined by Experian Goad are sub-divided into the following three sub-categories:

- **Retail services** – Class A1 and certain sui generis uses (including hairdressers, beauty salons, travel agents, launderettes, opticians, etc.);
- **Leisure services** - comprise cafés and restaurants (Class A3), betting shops (sui generis) and fast food/ takeaway outlets (Class A5); and
- **Financial and professional services** - cover all Class A2 uses (such as banks, estate agents, etc).

Goad Town Centre Definitions and Floorspace

- 5.9 The health checks provide an effective 'gap' analysis tool to help identify retail types and categories that are under or over represented in centres. This is based on benchmarking against Goad UK averages for all circa 2,000 centres and shopping locations covered by Experian.
- 5.10 It should be noted that in our description of each centre's town centre boundary we have referred to the boundaries defined by the respective Councils. However, where Experian Goad data is relied on for composition, the area surveyed by Goad is not necessarily identical to the Councils' identified town centre boundaries. As such, it is possible that the number of units set out in our analysis may relate directly to the Councils' defined centre boundaries.
- 5.11 The floorspace figures shown in the report are also derived from the relevant Goad Plan which show only the 'footprint' floorspace and the site area without the building lines. They should therefore not be read as a definitive report of floorspace, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.
- 5.12 Table 5.3 sets out the data used for each centre below:

Table 5.3: Diversity of Uses Data Source

Centre	Data Source
North Dorset	
Blandford Forum	Experian Goad (2017)
Gillingham	Experian Goad (2016)
Shaftesbury	Experian Goad (2016)
Sturminster Newton	Experian Goad (2015)
Stalbridge	CJ Audit (2017)/Google Maps (2016)
Weymouth & Portland	
Weymouth	Experian Goad (2017)
Portland	CJ Audit (2017)
West Dorset	
Dorchester	Experian Goad (2017)
Bridport	Experian Goad (2016)
Sherborne	Experian Goad (2016)
Lyme Regis	Experian Goad (2015)
Beaminster	CJ Audit (2017)/Google Maps (2016)
Poundbury	West Dorset District Council (2016)

Vacancies

- 5.13 The number and scale of vacancies in a centre, and the length of time properties have been vacant, represents a key performance indicator (KPI) to help assess a centre's overall vitality and viability. For example, high vacancy levels, or a concentration of vacancies in certain areas/streets, could point to underlying weaknesses in terms of retailer demand and/or the fact that vacant units are not meeting demand and are not 'fit-for-purpose'. Notwithstanding this, vacancies can arise in even the strongest centres due to the natural 'churn' in businesses opening and closing at any point in time. This KPI must therefore be used and interpreted with care.

Multiple and Independent Retailers

- 5.14 The Experian Goad Category Reports also provide analysis on multiple retail representation. A multiple is defined by Experian Goad as being part of a network of nine or more outlets. It is widely accepted that a good presence and mix of multiples in a centre, alongside a strong independent offer, helps to increase the overall attraction and performance of shopping centres. Multiples are a strong draw for customers and they help to generate frequent shopping trips and footfall, and linked expenditure for other shops, businesses and services.

Street/Covered Markets

- 5.15 Whether or not a centre has a market, and the quality and offer of a market, can give an indication as to whether a centre is vital and viable. Information regarding the health of the markets discussed in this report has been obtained from our own research and observations of the centres, as well as stakeholder consultation. In line with Paragraph 23 of the NPPF, existing markets should be retained and enhanced and, where appropriate, new ones should be created, ensuring that markets remain attractive and competitive.

Retailer Demands & Requirements

- 5.16 Evidence of requirements ('market demand') from retail and leisure operators for representation in a town centre can provide a further indication of the overall health and attraction of centre, and investor confidence. In this case we have drawn on standard published sources to inform our assessment of current market demand; including CoStar and the Requirements List. However, it should be noted that this published information is not definitive, as many retailers and leisure operators prefer not to announce their requirements as it can undermine their negotiating position with potential landlords. Furthermore, market demand is often opportunity-driven; for example in response to the marketing of new development and regeneration initiatives.

Prime Zone A Rents

- 5.17 The level of rent that businesses are prepared to pay for retail space, and the commercial yields achieved provide a further indication of the relative strength of the centre and its prime retail pitch. However, it should be noted that Prime Zone A rents and yields are not available for all centres, particularly smaller centres where there are more limited transactions. Therefore, an assessment of Prime Zone A rents and yields is only provided where available.

Customer Views and Behaviour

- 5.18 Our assessment of customers' views and behaviours draws on the findings of the household survey and in-centre surveys. The household survey comprised in total 1,200 interviews across twelve zones and asked

specific questions regarding respondents likes and dislikes about Dorchester, Weymouth, Bridport, Blandford Forum, Shaftesbury and Gillingham. It was agreed with the Councils that the survey would seek the opinions of respondents on six of the 'main' town centres across each of the three Council areas. To ensure the survey was of an appropriate length, questions were not asked about all of the centres within the survey area.

- 5.19 In-centre surveys were commissioned specifically for Dorchester and Weymouth, as they are the two main centres within the three Council areas. Approximately 173 respondents (86 in Weymouth, 87 in Dorchester) were asked a range of questions to better understand the overall attraction and performance of the main centres; including questions on the purpose of their visit, mode of travel, duration and frequency of visits, and likes and dislikes about the centre. Respondents were interviewed at six different locations around the town centre in both Dorchester and Weymouth.

Environmental Quality

- 5.20 Environmental quality represents a key performance indicator (KPI) to help assess a centre's overall vitality and viability. An assessment of environmental quality (including cleanliness and attractiveness, security, treatment of buildings and open spaces) has been undertaken using our own research and observations of the centres, as well as stakeholder consultation.

Accessibility

- 5.21 A centre's vitality and viability can also be impacted by the ease of accessibility by different modes of travel, and the level and quality of car parking. This assessment has been informed by the survey evidence, along with our own research and observations of how easy a centre is to access; mobility time and cost; public transportation; traffic management and signage; barriers; car parking; and access by other modes. Consultation with key stakeholders has supplemented our research.

Out of Centre Provision

- 5.22 Out of centre provision has been determined using a number of sources. For example, *Completely Retail*, a comprehensive retail database, has been referenced to identify the location, scale and operators trading outside of the main centres. We have also referred to the results of the household survey and consultation with key stakeholders.

New Investment & Potential Development

- 5.23 Carter Jonas has relied on the Councils to identify new investments and potential development opportunities within the three Council areas. This has also been supplemented by consultation with key stakeholders, as well as a review of relevant planning history.
- 5.24 Based on the above KPIS, the following sets out our health check assessments for the main centres in the three local authority areas.

6 BLANDFORD FORUM HEALTH CHECK

Context

- 6.1 Blandford Forum is an old market town located within the south east of the North Dorset District Council area. The town is located approximately 26km north east of Dorchester. It is said to be one of the most complete Georgian town centres in the country. The whole town centre is within a Conservation Area and there are a significant number of important listed buildings.
- 6.2 The North Dorset Local Plan Part 1 (2016) designates Blandford Forum as a 'town centre'. It is therefore a sequentially preferred location for main town centre uses including: retail development, leisure, entertainment facilities, certain intensive sport and recreation uses, offices, and arts, cultural and tourism uses (see Policy 12 – Retail, Leisure and Other Commercial Developments).
- 6.3 The town centre, as defined within the Annual Monitoring Report 2005 for North Dorset, extends just south of Whitecliff Gardens to the north, along Salisbury Street and Langton Road to the east, to the River Stour in the south, and along River Mews and White Cliff Mill Street to the west. The North Dorset District-Wide Local Plan (Saved Policies) (2003) Proposals Map sets out the following frontages:
- **PSFs** form an 'L' shape and are concentrated along Salisbury Street and Market Place. PSF also extends along East Street from Sheep Market Hill to Common Lane.
 - **SSFs** are located along East Street, West Street, White Cliff Mill Street and Salisbury Street.
- 6.4 In addition, there are a number of side streets, including Greyhound Square, Barnack Walk, Tabernacle Walk and The Plocks, within which retail units are located.

Retail Composition & Diversity of Uses

- 6.5 Table 6.1 below summarises the retail and service composition of the centre in terms of total units and floorspace, based on the latest Experian Goad Category Report.

Table 6.1 Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index*
Comparison	65	35.0%	31.1%	112
Convenience	14	7.5%	8.8%	86
Retail Service	28	15.1%	14.4%	104
Leisure Service	42	22.5%	23.9%	94
Financial & Business Service	25	13.4%	10.3%	130
Vacant Retail & Service Outlets	12	6.5%	11.2%	58
TOTAL:	186	100.0%	100.0%	-

Source: Experian Goad Category Report (March 2017)

Notes: *The index is a comparison with the national average for all circa 2,000+ centres audited by Experian. A score of 100+ indicates an above average provision in that particularly category, whereas a score of under 100 shows a relative under-provision.

Table 6.2: Current Retail and Service Offer – Floorspace

Category	Floorspace (sqm)	% of Total Outlets	UK (%)	Index
Comparison	7,051	25.2%	35.0%	72
Convenience	5,026	18.0%	15.2%	119
Retail Service	2,165	7.7%	6.8%	114
Leisure Services	7,906	28.2%	25.0%	113
Financial & Business Service	2,834	10.1%	7.7%	131
Vacant Retail & Service Outlets	3,010	10.8%	9.7%	111
TOTAL:	27,992	100.0%	100%	-

Source: Experian Goad Category Report (2017)

Notes: The floorspace figures are derived from the relevant Goad Plan (see Section 5). Figures may not sum due to rounding.

Convenience Offer

- 6.6 There are 14 convenience units in the survey area according to the latest 2017 Experian Goad Category Report, trading from a total floorspace of 5,026 sqm. Although provision as a proportion of total outlets (7.5%) is below the national average (8.8%), floorspace provision (18.0%) is higher than the national average (15.2%).
- 6.7 The centre's food provision is anchored by Morrisons and Marks & Spencer (M&S) which are located on West Street and Langton Road respectively. The M&S offer is predominantly convenience goods (i.e. food and drink). Blandford Forum's convenience offer is also supported 1 baker & confectioners, 2 butchers, 1 CTN (confectionary, tobacco and news), 2 smaller convenience stores, a frozen food store, a greengrocer and 2 health food shops. There is also an out of centre Tesco store situated at Stour Park to the southeast of the town centre, a Co-op store on Salisbury Road to the north east of the town centre, and a Lidl store, which has recently opened on Shaftesbury Lane also to the north east of the town centre.
- 6.8 The results of the market share analysis show that Blandford Forum is retaining 11.7% of expenditure from within the North Dorset area with zone 12 accounting for 28.2% of the overall market share (see Section 4). Morrisons is the town centre food store achieving the highest market share (6.3%) within Blandford Forum; however the out of centre Tesco achieves a much higher market share of (19.9%) within North Dorset.
- 6.9 In summary, whilst Blandford Forum's total convenience outlets is below the national average, it has an above average floorspace provision. The Tesco store is performing relatively well, but the in-centre stores are not retaining as a high level of expenditure as would be expected. We assume this is a result of competition from other food stores within the district. Notwithstanding this, overall we consider that it has a good convenience offer which caters for both the 'bulk' and 'top-up' food shopping needs of its local population.

Comparison Offer

- 6.10 There are 65 comparison goods retailers located within Blandford Forum Town Centre trading from a total floorspace of 7,051 sqm). The number of outlets represents 35.0% of total units in the centre, which is above the national average of 31.1%. The current floorspace provision represents 25.2% of total floorspace in the centre, which is below the national average of 35.0% and is a decrease from the 2015 figure (29.6%).

- 6.11 Across the different comparison sub-categories, the centre has a high representation of many categories including charity shops, chemists, craft shops, electrical stores, antique shops, art shops, children's wear, DIY and home improvement stores, sports and leisure goods, jewellery and watches, and textiles and soft furnishing stores. Whilst the centre is largely characterised by independent comparison retailers, a number of multiple retailers are also present including WHSmith and Clarks.
- 6.12 There is an overprovision of charity shops. There are currently 10 within the centre which is equivalent to 5.4% compared to a national average of 2.7%.
- 6.13 It is also noted that the markets in the town sell a variety of comparison goods.
- 6.14 Blandford Forum has the highest market share within the North Dorset Council area (14.5%) although we consider this figure to still be relatively low. This is most likely a reflection on the limited provision of non-food goods in comparison to other centres outside of the district, such as Poole and Salisbury. However we consider that the centre has an adequate comparison offer given its size, role and function in North Dorset's network and hierarchy of centres.

Service Offer

- 6.15 As Tables 6.1 and 6.2 show, there are 95 retail, financial and leisure service outlets in Blandford Forum Town Centre, with a total floorspace of 12,905 sqm. Services account for 51.0% of all units and 46.0% of total floorspace, which is above the respective national averages of 48.6% and 39.5%.
- 6.16 The following provides a brief summary of provision across the different service categories:
- There are 28 **retail services**, which represent 15.1% of total outlets and is above the national average of 14.4%. This category is mostly made up of 19 health and beauty outlets; which is equivalent to 10.2% of units and is above the national average of 8.9%. Provision also includes 2 dry cleaners and launderettes, 3 opticians, a post office and a travel agent.
 - In terms of **financial services**, there are 25 outlets, which represents 13.4% of total units and is marginally above the national average of 10.3%. The Goad report shows that financial services include 12 property services, 4 retail banks, as well as 2 building societies and 2 building supply services.
 - There are 42 **leisure service** outlets, equivalent to 22.5% of total units, which is just below the national average. Leisure provision includes 10 cafes, 10 fast food takeaways, 7 restaurants, 5 clubs, and 4 public houses. According to the consultation with key stakeholders, the centre has a reasonable night time economy, with the main restaurants and public houses attracting people on Friday and Saturday evenings.
- 6.17 Given the size and role of the centre, we consider that the overall representation of services is appropriate. We assess the potential need for new commercial leisure uses in more detail in Section 19 of this study.

Vacancies

- 6.18 There were 12 vacant units recorded by Experian Goad in 2017. This is equivalent to a vacancy level of 6.4%, which is below the national average of 11.2%. In summary, whilst vacancy levels are below the national average, there could be an opportunity to attract further businesses into the centre in order for improvements to be made, subject to market demand and the right accommodation in terms of location, scale and format being available.

Multiple and Independent Retail Representation

- 6.19 A multiple is defined by Experian Goad as being part of a network of nine or more outlets. It is widely accepted that a good presence and mix of multiples in a centre, alongside a strong independent offer, helps to increase the overall attraction and performance of shopping centres. Multiples are a strong draw for customers and they help to generate frequent shopping trips and footfall, and linked expenditure for other shops, businesses and services.
- 6.20 Based on the 2017 Goad Category Report and our own town centre audit, there are some 41 multiple retailers. This includes a number of key names such as Boots, Carphone Warehouse and Clarks.
- 6.21 There are also a wealth of independent retailers/ service providers, as well as the independent traders in the multiple markets. Consultation with key stakeholders revealed that the independent retailers are a key strength within the town, and as such they make an important contribution to the centres overall diversity, vitality and viability.
- 6.22 In summary, it is considered that there is a good and complementary mix of multiple and independent retailers, serving the centre and its catchment population. Such retailers positively add to the attraction and character of the centre, and its overall vitality.

Markets

- 6.23 Markets are held on Thursdays and Saturdays each week in the Market Place throughout the year. Trading hours are between 8.30am and 4.30pm and a wide variety of goods are sold including food, luggage, clothing and household goods. Furthermore, Blandford Indoor Market, in the Corn Exchange and the Shambles, is held every Thursday between 6.30am and 4.30pm.
- 6.24 Alongside these weekly markets, the Blandford Craft Market is held in the Shambles every second and fourth Friday from February to December, and the Farmer's Market is held in Market Place on the second Friday of the month.

Retailer Demand & Prime Zone A Rents

- 6.25 Appendix 7 sets out the requirements from retail and leisure operators for representation in the town, as listed by the latest available *Requirement List* (June 2017). In summary there are 6 operators with published requirements; equivalent to a total minimum floorspace of 4,808 sqm gross. These include retailers and business ranging from Aldi and Superdrug, to Cats Protection and Toolstation. There are also stated requirements from two hotel operators, namely Travelodge and Premier Inn.
- 6.26 Please note that no market information was available on prime zone A rents at the time of preparing this study.

Household Survey

- 6.27 We have drawn on the findings of the household telephone interview survey (HTIS) to help gauge customers' views and perceptions of the town centre as a place to shop and visit for a range of leisure uses and other activities.

- 6.28 The survey results show that the majority (73.5%) of respondents from the study area never visit Blandford Forum. Of those who do visit from the study area, 20.4% visit one day a week, and 13.8% visit 2-3 days a week.
- 6.29 In terms of what people 'like' about Blandford Forum town centre, the most frequently raised themes are shown in Table 6.3.

Table 6.3: Key features respondents liked about Blandford Forum Town Centre

Response	Study Area
Close to home	30.4%
Nothing/very little	25.7%
Attractive environment/nice place	13.5%
Good range of non-food goods	5.3%
Easy to park	5.1%
Traditional	4.2%
Don't know	3.8%
Goods pubs, cafes, or restaurants	3.0%
Easy to get to by car	2.3%

- 6.30 As Table 6.3 shows, the majority of respondents from within the study area indicated that they visit Blandford Forum because it is close to home. The second popular response indicated that respondents did not have anything in particular that they liked about Blandford Forum. Other common responses include the attractive environment, the good range of non-food goods, and the fact that it is easy to park.
- 6.31 Respondents were also asked what, if anything, they would improve in Blandford Forum that would encourage them to visit more. Table 6.4 provides a summary of the most frequently raised suggested improvements for the town centre from respondents.

Table 6.4: Key improvements for Blandford Forum Town Centre

Response	Study Area
Nothing	57.8%
Don't know	26.5%
More national multiple shops	3.9%
More/better parking	3.8%
More independent shops	3.1%
More/better comparison retailers	2.7%
Free car parking	1.9%
More/better food shops	1.4%
Better access by road	1.1%

- 6.32 As Table 6.4 shows, the majority of respondents across the study area stated 'nothing' or 'don't know' (84.3%). Respondents highlighted a need for more national multiple shops, more or better parking, more independent shops, and more or better comparison retailers. Other key improvements identified include free car parking, more or better food shops, and better access by road.

Environmental Quality

- 6.33 Blandford Forum town centre lies entirely within the Blandford Forum Conservation Area and most buildings within the town centre area are listed.

- 6.34 Blandford Forum town centre benefits from a vibrant and pleasant shopping environment. It is a traditional, rural market town and the Georgian architecture contributes to an attractive street scene. The centre's traditional shop fronts are well kept and they also add to the centre's distinctive character.
- 6.35 The centre benefits from well-maintained planters which help to create an attractive and welcoming environment. There are a number of green open spaces within or close to the town centre include the Woodhouse Garden which is adjacent to the post office on The Plocks, and Stour Meadows just south of the town centre where there is a mixture of riverside vegetation, grassland, and mature trees.
- 6.36 Furthermore, in terms of street furniture, whilst waste bins are abundant, we noted a lack of seating areas within the town to provide stopping and meeting points for visitors.
- 6.37 Overall, the town centre has an attractive environment with a good amount of green open space, but we recommend improvements in public seating to provide shopping focal points and encourage longer dwell times and greater spend.

Accessibility

- 6.38 Blandford Forum has good 'A' road links such as the A350 and A354 and has good access by car from surrounding areas. Car parks in the town include:
- Church Lane (23 spaces);
 - Eagle House Gardens (32 spaces);
 - Langton Road (124 spaces);
 - Marsh and Ham (188 spaces);
 - Station Road (37 spaces); and
 - Stour Meadows (92 spaces);
- 6.39 Car parks are located mainly to the edges of the town, predominantly located to the rear of East Street and West Street. Furthermore, there is some provision for on street parking on both sides of the road in some areas of the town centre. Whilst car parking provision in the centre is good, it has been recognised by key stakeholders that there is a lack of free parking in the town (aside from Stour Meadows). However, we consider it to be relatively low cost.
- 6.40 There is no railway station located in the town centre. The nearest stations are located at Gillingham, Poole or Dorchester. There are three bus routes which service Blandford Forum – the Salisbury service runs 5 times per day; the Gillingham service runs 8 times per day; and the Poole service runs 9 times per day. Key stakeholders acknowledge public transport to be one of the town's key weaknesses and as such there is an interest from the local community to improve such services.
- 6.41 In terms of pedestrian accessibility within the town, whilst pedestrian crossings are minimal, there are a number of raised paving sections which allow pedestrians good access to the retail, business and leisure units.
- 6.42 In summary, accessibility to and within Blandford Forum is considered to be adequate. Whilst pedestrian and vehicular accessibility is good, there is a lack of free parking within the centre and public transport provision is poor.

Out of Centre Provision

- 6.43 Out of centre provision around Blandford Forum includes Stour Park in Blandford St. Mary which is situated less than 1km south east of Blandford Forum town centre, close to the A354. Stour Park consists of both convenience and comparison provision including a Tesco Superstore (and in-store Timpson concession stand) petrol filling station as well as Homebase. The Homebase store also incorporates an Argos 'click-and-collect', which has been designed for customers to collect online orders.
- 6.44 Further out of centre provision includes the Lidl store on Shaftesbury Lane. The discounter food store was granted planning permission on 5th October 2016 and extends to 2,756 sqm. It should be noted that this store opened on 27th July 2017, which was after the household survey was conducted. It is therefore treated as a commitment for the purpose of the retail capacity assessment (see Section 19).

New Investment & Potential Development

- 6.45 Policy 16 (Blandford) of the North Dorset Local Plan Part 1 (2016) sets out that at least 1,200 dwellings will be built in Blandford between 2011 and 2031. In addition to infilling and redevelopment within the settlement boundary, Blandford's housing needs will be met through:
- Mixed-use regeneration of the Brewery site;
 - The development of land to the southeast of Blandford St Mary; and
 - The development of land to the west of Blandford St Mary.
- 6.46 The North Dorset Local Plan Part 1 (2016) states that employment needs up to 2031 will be met through:
- Mixed-use regeneration of the Brewery site;
 - The development of land off Shaftesbury Lane;
 - The development of vacant sites on existing industrial estates;
 - The retention of existing employment sites;
 - The extension of the existing Tesco supermarket; and
 - Provision of a new supermarket off Shaftesbury Lane (Lidl).
- 6.47 *The Blandford + Neighbourhood Plan 2015-2031* states that at least 1,700 homes will be provided at Blandford Forum and Blandford St Mary during the period 2015-2031 with the Draft Neighbourhood Plan allocating the land to the north and east of Blandford Forum for housing development in addition to the sites identified in the Local Plan.
- 6.48 Land for development is allocated within the *Blandford + Neighbourhood Plan 2015-2031* to meet the town's employment need. This will be met through the extension of the Sunrise Business Park; the development of land off Shaftesbury Lane; and the development of vacant sites on existing industrial estates. Additional retail floorspace will be provided through the provision of a new supermarket off Shaftesbury Lane (Lidl).
- 6.49 The Independent Examiner found that Policy 1 of the Draft Neighbourhood Plan, which proposes development on land to the north and east of Blandford Forum for a mix of uses including housing and the extension of the Sunrise Business Park, is not in general conformity with the strategic policies of the development plan and as such, the policy does not meet the Basic Conditions. The Independent Examiner's Report finds the draft Neighbourhood Plan meets the Basic Conditions, subject to the deletion of Policy 1- Land North & East of Blandford Forum.

- 6.50 Planning permission has been granted for the regeneration of the Grade I listed Corn Exchange as part of the Town Council's strategic plan programme (Ref: 2/2017/1076/DOC). The regeneration would involve a complete restoration, refurbishment, enhancement and re-equipping of the facility for use as a multi-purpose venue. Such work is planned to return the building to a vibrant hub, and attract people from the surrounding villages into the town. However we understand that due to rising costs and uncertainties concerning acquiring external funding, these plans cannot be brought forward at present.
- 6.51 As mentioned above, an application was approved for planning permission to 'erect an A1 retail unit (Lidl food store) with associated car parking, landscaping and access arrangements' in October 2016 at Shaftesbury Lane, Blandford Forum (App Ref: 2/2016/0325/FUL). The store opened in September 2017 (after the household survey was conducted).

Summary

- 6.52 In summary the health check assessment has demonstrated that overall Blandford Forum is a vital and viable centre, although there is scope for improvements to its offer and public realm.
- 6.53 The key strengths and weaknesses of the centre include the following:
- It has a good range of shopping and leisure facilities typically found in a centre of its size and position in the retail hierarchy.
 - The current vacancy level is below the national average and there are no significant concentrations of vacant units within the centre. Notwithstanding this, some of the stakeholders we spoke with did highlight some concerns with regard to the number of vacancies across the centre.
 - Overall the centre has a good convenience provision, which is anchored by Morrisons and M&S. This is also supplemented by a number of small independent retailers including a bakers, 2 butchers, and a greengrocers. Out of centre provision close to/at Blandford Forum consists of Tesco, the Co-op and Lidl.
 - Whilst the centre's comparison offer is in line with the national average, the provision of services is above average. This provision is dominated by leisure services and includes many fast food takeaways, restaurants and public houses, which create and enhance the town's night time economy. The leisure services within the centre are supported by the nearby Blandford Camp.
 - The town hosts a large number of independent retailers which are considered to be one of the centre's key strengths as they contribute to the overall diversity, vitality and viability of the area.
 - Blandford Forum benefits from regular markets in the Market Place, the Shambles, and the Corn Exchange which make an important contribution to the town's retail offer.
 - The centre is a traditional market town and the Georgian architecture contributes to the street scene and creates an attractive shopping environment. Nonetheless, the town centre lacks public seating, which could be implemented to make an even more attractive centre.
 - Blandford Forum is well provided for in terms of the number of car parking spaces and we consider parking charges within the centre to be relatively low. There could be an opportunity however to improve public transport facilities within the town to improve the centre's accessibility.
 - There are a number of key developments in the pipeline, including the potential regeneration of the Corn Exchange, which we consider will further improve the town centre's offer and quality of the environment.

7 GILLINGHAM HEALTH CHECK

Context

- 7.1 Gillingham is defined as a 'town centre' within the *North Dorset Local Plan Part 1* (2016). It is the main service centre in the north of the district, situated around 5 miles northwest of Shaftesbury. It is also Dorset's most northerly town bordering Somerset and Wiltshire. The town is recognised for being one of the fastest growing areas in the South West with its 2011 population of 11,756 forecast to grow to in excess of 17,000 people by 2031.
- 7.2 The 2016 Local Plan Part 1 sets out that Gillingham's role as the main service centre in the north of the district will be maintained and enhanced through development/redevelopment within the settlement boundary; including the enhancement of the town centre and mixed use regeneration of the Station Road area.
- 7.3 The town centre boundary is defined within the 2005 Annual Monitoring Report. The boundary encompasses a relatively large area including the units along The Square, St Marys Place, High Street and part of Station Road. The town centre is bounded by Le Neubourg Way to the west and south, although neither Waitrose nor Asda are included within the boundary. To the east the centre is bounded by the units along the east of Station Road and the units up to Harding's Lane. To the north the centre is bounded by those units along the northern side of High Street. The North Dorset District-Wide Local Plan (Saved Policies) (2003) Proposals Map sets out the following frontages:
- The **PSF** runs along the southern side of High Street from the east of South Street to west of Station Road. Along the northern side of the road, the PSF includes the units east of Gillingham Methodist Church to west of School Lane.
 - The **SSF** along the northern side of the street includes the units east of School Lane up to, and including, the Bracher Brothers Funeral Directors. Along the southern side of the street the SSF includes units along the corner of Station Road/Newbury and the western side of Station Road near the junction with High Street. To the west of the town centre units between The Square and South Street are included within the SSF, as well as the units on The Square/St Mary's Place junction.
- 7.4 There is no defined PSA. It is noted that these boundaries and frontages are outdated and amendments are likely to be necessary as a result of the changes across the town centre since the AMR and 2003 Local Plan.

Retail Composition & Diversity of Uses

- 7.5 The table below summarises the composition of the centre's retail and service mix and diversity of uses based on the total outlets and floorspace recorded by Experian Goad.

Table 7.1: Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	23	23.2%	31.1%	74
Convenience	7	7.1%	8.8%	81
Retail Service	21	21.2%	14.4%	149
Leisure Service	18	18.2%	23.9%	77
Financial & Business Service	21	21.2%	10.3%	204
Vacant Retail & Service Outlets	9	9.1%	11.2%	82
TOTAL:	99	100%	100%	-

Source: Experian Goad Category Report (October, 2016)

Table 7.2: Current Retail and Service Offer- Floorspace

Category	Floorspace (sqm)	% of Total Outlets	UK (%)	Index
Comparison	4,524	20.0%	35.0%	57
Convenience	7,711	34.2%	15.2%	225
Retail Service	1,970	8.7%	6.8%	129
Leisure Services	3,177	14.1%	25.0%	57
Financial & Business Service	3,112	13.8%	7.7%	177
Vacant Retail & Service Outlets	2,081	9.2%	9.7%	98
TOTAL:	22,575	100%	100%	-

Notes: The floorspace figures are derived from the relevant Goad Plan (see Section 5)

Source: Experian Goad Category Report (October, 2016). Figures may not sum due to rounding.

Convenience Offer

- 7.6 There are 7 convenience units in the defined town centre according to the latest 2016 Experian Goad Category Report, trading from a total estimated (Goad) floorspace of 22,575 sqm. The convenience offer represents 7.1% of total units, which is below the national average of 8.8%, but 34.2% of total floorspace, which is significantly above the national average of 15.2%.
- 7.7 This large floorspace is explained by the fact that the town's convenience offer is dominated by three main food stores – namely Waitrose, Lidl and Asda – which together cater for budget, mid-range and higher end food purchases. The results of the market share assessment reveal that within the North Dorset district area, Gillingham town centre achieves 26.6% of the market share which is the highest within the district. Waitrose accounts for 10.5% of this total figure and Lidl accounts for 9.5% of this figure.
- 7.8 In addition to the three supermarkets, there is a grocer/delicatessen, butcher and a small convenience store. There is also an Iceland frozen food store situated adjacent to Asda, although this is not included within the Goad audit.
- 7.9 There was a former Co-op store located on the High Street, but this has been vacant since it was partially destroyed in October 2012 by a fire. The closed store occupies a prime trading position, although we understand that it is soon due to reopen as a community charity centre. Gillingham Community Church will take over the building to use as a local food bank and venue for community use.
- 7.10 Whilst we consider that the town's food and convenience offer is relatively good, we note that there are no bakers/confectioners, fishmongers, greengrocers, health food stores or off licenses in Gillingham. The centre could therefore benefit from attracting independent traders to complement the larger food store offer.

Comparison Offer

- 7.11 There are 23 comparison goods retailers located within Gillingham town centre, trading from a total (Goad) floorspace of approximately 4,524 sqm. The comparison goods offer represents 23.2% of total units and 20.0% of total floorspace, which is below the national average of 31.1% and 35.0% respectively. The majority of units are relatively small in size

- 7.12 The range of non-food sub-categories represented in the town centre include charity shops, chemist/pharmacy, art shop, florists, greeting cards, hardware/household goods and jewellery. There are five charity shops (5.1%) which represents an overprovision of this type of store based on the Goad national averages. There is also a shortage of clothing stores within the centre.
- 7.13 The centre is predominately occupied by independent retailers. Pets at Home and The Original Factory Shop are the only multiple comparison retailers in the centre.
- 7.14 Gillingham's comparison goods market share is low, with a retention rate of just 5.5% within the North Dorset area and just 1.8% across the entire study area, reflecting the weak and limited non-food goods provision in the town centre.
- 7.15 Overall, we consider Gillingham's comparison offer is below average given its role as a main town centre. Although the dominance of independent retailers is regarded as a positive attraction, we consider that the quality and range of retailers and goods sold needs to increase if Gillingham is to retain existing visitors and attract additional trips to the centre. However, we understand the difficulties of this due to the proximity and attraction of the nearby larger competing centres of Yeovil and Shaftesbury and the small unit sizes in the town centre.

Service Offer

- 7.16 There are 60 service outlets in Gillingham town centre. They account for 60.6% of all units which is significantly above the national average of 48.6%. Such an overprovision of services is often considered to be an indicator of a centre that is not performing well. However, if the quality of the services is good then this is not always the case.
- 7.17 The following provides a brief summary of provision in the different service categories:
- There are 21 **retail services**, which represents 21.2% of total outlets. This is above the national average of 14.4%. Retail service provision includes a dry cleaners/laundrette, a petrol filling station, 11 health and beauty outlets, an opticians, a post office, a travel agents and 2 vehicle repair shops. For a centre of this size, we consider that Gillingham has a strong retail service sector.
 - In terms of **financial services**, there are 21 outlets, which represents 21.2% of total units and exceeds the national average of 10.3%. Financial services includes 3 financial services, 10 estate agents and 2 retail banks. Banks in the centre include Lloyds and TSB. There was previously a Natwest bank situated on the corner of Station Road/Newbury but this is now closed.
 - There are 18 **leisure service** outlets which represents 18.2% of total units. This is below the national average of 23.9%. Leisure provision includes 2 cafes, a betting office, 7 fast food outlets, 2 public houses and 3 restaurants. Cafés in Gillingham include Costa as well as independent operators. There is also a community cinema in the Methodist Church. There is a limited evening/night time economy. In our view the centre would benefit from additional food and beverage provision.
- 7.18 Given the size and role of the centre, we consider that the overall representation of services is adequate, particularly in terms of financial and retail services. The centre has a below average proportion of leisure services and we consider it could benefit from expansion and an improvement in the quality of its leisure offer.

Vacancies

- 7.19 There were 9 vacant units recorded by Goad in 2016. This is equivalent to 9.1% which is below the national average of 11.2%. This low vacancy rate indicates a relatively healthy town centre that is performing well.

- 7.20 However, our 2017 site visit confirmed that there are a number of notable vacancies located around the town centre. The main vacant unit includes the large former Co-op store on the High Street, although we understand that it is soon due to reopen as a community charity centre. An application for the change of use of the building from Co-op to D1 non-residential use was approved in August 2017 (Ref: 2/2017/0843/COU). The vacant unit also has a large car park which is situated to the rear of the unit and is still in use.

Multiple and Independent Retail Representation

- 7.21 The 2016 Goad Category Report, identified that there are 23 multiple retailers in the surveyed area. Key multiple operators include Waitrose, Costa, Lidl, Pets At Home, The Original Factory Shop and a number of high street charity shops. The vast majority of retailers in the town centre are independents. Due to the size of the town centre and the small size of the units, it is unlikely that the centre will be able to attract a major high street retailer at the present time. Therefore, the centre should aim to target, attract and support quality independent local and regional retailers who are able to expand the range of products sold in the town centre.

Markets

- 7.22 There is no street market operating in Gillingham, although events and specialist markets are held throughout the year. For example, Gillingham Country Market is held every Friday between 8.30am and 11am in the Methodist Church Hall. The market specialises in the sale of local produce, ranging from food to plants to gifts and crafts.

Retailer Demand & Prime Zone A Rents

- 7.23 **Table 3** in **Appendix 7** sets out the published demand from retail and service operators seeking representation in Gillingham, as listed by the Requirement List (June 2017). In summary, there are 3 operators with published requirements; equivalent to a total minimum floorspace of 1,394 sqm gross. In summary the list shows that all three requirements are from retailers. This includes two comparison goods retailers (Sussex Beds and Savers). No market information was available on Prime Zone A rents in Gillingham at the time of preparing this study.

Household Survey

- 7.24 We have drawn on the findings of the household telephone interview survey (HTIS) to help gauge customers' views and perceptions of the town centre as a place to shop and visit for a range of leisure uses and other activities.

Table 7.3: Features respondents liked about Gillingham town centre

Response	Study Area
Nothing/very little	29.0%
Good food stores	20.5%
Close to home	17.5%
High quality shops	6.1%
Good facilities in general	5.9%
Don't know	5.8%
Good range of non-food shops	5.1%
Good range of independent shops	4.4%
Close to friends or relatives	4.3%
Attractive environment/nice place	3.5%

- 7.25 The majority of respondents indicated that they liked nothing/very little about Gillingham town centre. Responses like this are relatively typical to household surveys. Other common responses include the good range of food stores, high quality shops, good range of non-food shops and good range of independent shops. This compares with our site visits and audit of the centre which confirmed the dominance of independent retailers and range of food stores, but noted a more limited number of non-food shops.
- 7.26 Respondents were also asked what, if anything, they would improve in Gillingham that would encourage them to visit more. The table below provides a summary of the most frequently raised suggested improvements for the town centre from respondents.

Table 7.4: Key improvements for Gillingham town centre

Response	Study Area
Nothing	59.1%
Don't know	28.9%
More national multiple shops/High Street shops	4.9%
More independent shops	4.1%
More/better comparison retailers	1.6%
Better access by road	1.1%
More/better parking	1.0%
Less charity shops	1.0%
More/better places for eating out	0.9%
More/better food shops	0.9%

- 7.27 The majority of respondents across the study area stated 'nothing' or 'don't know' (88%). Those that did identify improvements highlighted a need for more high street operators, more independent retailers and more/better non-food shops. These responses support the findings of the site visits and health check. Other key improvements identified include: better parking, access by car and fewer charity shops.

Environmental Quality

- 7.28 Overall we consider that Gillingham has an adequate environmental quality. There are a number of buildings of architectural merit across the town centre such as Gillingham Methodist Church and the former Lloyds bank building, which complement the character of the small, traditional town centre. Much of the centre is located within the Gillingham town centre conservation area and there are a large number of listed buildings including the Vicarage School Room and the Red Lion public house.
- 7.29 The town centre also benefits from a large area of green open space - the Town Meadow – that is accessed via the High Street and links the main town centre to the library and Waitrose. Events are held here throughout the year including 'Pizza on the Meadow' and 'Gillingham in Gear'. There are planters throughout the centre including opposite the meadow on the other side of the High Street and outside the former Co-op store. Public seating across the town centre is plentiful.
- 7.30 Notwithstanding this, there are a number of areas which we have identified that require further attention to improve the aesthetic quality of the existing buildings. For example, the units occupied by the vehicle service and repair company along the western side of Station Road to the south of the centre appear rundown and do little to create an appealing gateway site into the town centre. Similarly, the area around the station comprises mainly warehouse and industrial units which do not contribute to the creation of an inviting space for those travelling to and from Gillingham by train. The small parade of shops to the east of Gillingham Town Meadow also appears relatively tired and in need of modernisation.

- 7.31 The centre is relatively clean and tidy throughout, however, there was evidence of littering and vandalism in the former Co-op car park. The centre could benefit from the provision of additional litter bins.
- 7.32 Overall, Gillingham has a relatively pleasant environmental quality, enhanced by the Town Meadow. However we advise that there is scope for improvement to strengthen the traditional character of the town centre.

Accessibility

- 7.33 Gillingham is served by a railway station situated to the south of the town centre. This provides services to and from Exeter, London Waterloo and Yeovil. The bus service connecting the town to the surrounding rural villages is poor.
- 7.34 There is scope to improve pedestrian links across the town. For example, the station is situated around 300 metres south of the High Street and is separated from the town centre by the busy Le Neubourg Way. Additionally the industrial estate surrounding the station creates a somewhat threatening pedestrian environment. There is also a lack of signage between the station and the town centre. Pedestrian linkages between Waitrose/the library and the town centre are poor and could be improved.
- 7.35 At the time of our visits pedestrian flows were weak along the western end of the High Street. This is possibly a result of the lack of active uses in this area, in contrast to the southern end, and the long length of the street which discourages pedestrian movement along the entire street. Pedestrian flows were strongest outside of the former Co-op. Waitrose, Asda and Lidl at the time of our visit.
- 7.36 In addition to car parks serving the town's supermarkets (including Asda, Waitrose and the former Co-op store), there are a number of other car parks in the town centre including:
- Chantry Fields (73 spaces);
 - Gillingham station (140 spaces);
 - Harwood Retail Centre (55 spaces);
 - Gas Lane (22 spaces) situated close to The Square; and
 - Gillingham High Street (51 long stay/20 short stay).
- 7.37 The quantity of parking is sufficient, although much of it is situated to the south of the centre where there are poor connections to the High Street.

Out of Centre Provision

- 7.38 There is no out of centre retail provision in Gillingham.

New Investment & Potential Development

- 7.39 The North Dorset Local Plan Part 1 (2016) sets out that a strategic site allocation known as the 'southern extension' will expand the built-up area of the town to the south and east. The four main areas proposed for development include:
- (i) land to the east of Ham;
 - (ii) land to the south of Ham;
 - (iii) land to the east of Lodden Lakes; and

(iv) land to the south of Brickfields Business Park.

- 7.40 Development will comprise mainly housing, with employment development to the south of Brickfields Business Park and on Kingsmead Business Park. The southern extension will result in a significant population increase. The Local Plan has set a housing target of at least 2,200 homes across the plan period with around 1,800 of these homes located in the southern extension. As well as meeting this housing need through the strategic site allocation, housing will also be provided through the development of the land to the south and south-west of Bay and above flats and offices to support the mixed-use regeneration of land at Station Road to the south of the town centre. The submission draft of the Gillingham Neighbourhood Plan 2016-2031 allocates the sites identified in the Local Plan.
- 7.41 The Station Road area is also identified in the North Dorset Local Plan Part 1 2016 for mixed-use regeneration, comprising employment, retail and residential uses. Policy 17 (Gillingham) sets out that in the period up to 2031, additional retail floorspace will be brought forward with a focus on comparison retailing as part of the mixed-use regeneration of the Station Road area. Station Road is a key gateway site to the town centre and is the main route for those visiting the town via bus or rail. Currently the area around the station is an example of underutilised land comprising old warehouses and industrial units. The area would benefit from redevelopment to help create an attractive gateway site. In January 2012, permission was granted for the erection of 5 retail units and 48 parking spaces (ref: 2/2011/0936/PLNG). In September 2014 an application for a non-material amendment to reduce the number of retail units to 2 and increase car parking spaces from 48 to 55 was approved (ref: 2/2014/0859/NMA). These two units are now occupied by Iceland and Pets at Home as part of Phase 1 development. This site is now known as Harwood Retail Centre. An application for Phase 2 of the development was submitted in August 2017 (ref: 2/2017/1266/FUL) to '*erect 2 no. buildings comprising 6 no. units for flexible uses as shops, restaurants and cafes and hot food takeaway (A1, A3 and A5) and 5 no. dwellings*'. The proposals comprise 507.2 sqm of flexible A1/A3/A5 use.
- 7.42 An application was submitted in December 2016 for the '*erection of a Class A1 food store (1,785 sqm gross) with associated access, car parking and landscaping*' outside of the town centre boundary on Shaftesbury Road (ref: 2/2016/1899/FUL). The application was submitted on behalf of discount food retailer, Aldi, and included approximately 108 car parking spaces. This application was refused in August 2017 due to the impact on the surrounding highway network, perceived harmful impact on the town centre and the loss of protected trees on site. The North Dorset District Council Local Plan Part 1 identifies this site as the preferred location for the proposed Local Centre for the Gillingham Southern Expansion Area.

Summary

- 7.43 In summary, the health check assessment has demonstrated that overall Gillingham is fulfilling the basic needs of its town centre role. However there are a number of issues and challenges that have been identified that will need to be addressed to ensure it remains a vital and viable centre.
- 7.44 Based on the evidence, market research and stakeholder engagement the key strengths and weaknesses of the centre in our view include the following:
- Gillingham has a good range of supermarkets including Waitrose, Iceland, Asda and Lidl.
 - There is a lack of smaller independent food stores including fishmongers, bakers, butchers or greengrocers.
 - Comparison retail provision is relatively weak, and the proportion of comparison stores is significantly below the national average. The market share results reflect this.
 - There are few multiple retailers in the town centre.

- Retail and financial service provision is good and caters for a wide range of local needs.
- The proportion of leisure services is below the national average.
- There is a limited evening and night time economy.
- There is no regular street market.
- Pedestrian linkages across the centre require improvement; particularly between Waitrose and the town centre and the station area to the town centre.
- The centre benefits from Town Meadow which provides residents and visitors with a large area of green community space.
- Public realm improvements are needed particularly around the station and Station Road area.

8 SHAFTESBURY HEALTH CHECK

Context

- 8.1 Shaftesbury is a small medieval market town in North Dorset, located halfway between Blandford Forum and Warminster on the A350 (7 miles south of the A303). The town is the home of Gold Hill, which was made famous by the 'Hovis' 1970s TV advert, and has significant views over the Blackmore Vale. It is a popular tourist destination attracting many visitors.
- 8.2 The North Dorset Local Plan Part 1 (2016) designates a 'town centre' at Shaftesbury. It is therefore a sequentially preferred location for main town centre uses including: retail development, leisure, entertainment facilities, certain intensive sport and recreation uses, offices, and arts, cultural and tourism uses (see Policy 12 – Retail, Leisure and Other Commercial Developments).
- 8.3 The shopping area of Shaftesbury follows the hillside and is primarily concentrated along High Street and Bell Street, with a number of retail units located on side streets such as Mustons Lane, Swan Yard and Church Lane. The town centre, as defined within the Annual Monitoring Report 2005 for North Dorset, extends along The Beeches and Angel Lane to the east; New Road and Lyons Walk to the west; and extends southwards to include the buildings to the south of High Street. The North Dorset District-Wide Local Plan (Saved Policies) (2003) Proposals Map sets out the following frontages:
- The **PSFs** extend from the Shaftesbury Arts Centre in the Oldmarket Playhouse in Bell Street, down the High street as far as the junction with Angel Lane.
 - No **SSFs** are defined.

Retail Composition & Diversity of Uses

- 8.4 Table 8.1 below summarises the centre's retail and service mix and diversity of uses based on the total outlets and floorspace recorded by Experian Goad.

Table 8.1 Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	49	37.7%	31.1%	120
Convenience	13	10.0%	8.8%	115
Retail Service	21	16.2%	14.4%	114
Leisure Service	18	13.9%	23.9%	59
Financial & Business Service	23	17.7%	10.3%	169
Vacant Retail & Service Outlets	5	3.9%	11.2%	34
TOTAL:	130	100.0%	100.0%	-

Source: Experian Goad Category Report (March 2016)

Table 8.2: Current Retail and Service Offer – Floorspace

Category	Floorspace (sqm)	% of Total Outlets	UK (%)	Index
Comparison	6,791	29.3%	35.0%	83
Convenience	6,011	26.0%	15.2%	171
Retail Service	2,703	11.7%	6.8%	173
Leisure Services	3,976	17.2%	25.0%	70
Financial & Business Service	2,973	12.8%	7.7%	164
Vacant Retail & Service Outlets	669	2.9%	9.7%	31
TOTAL:	23,123	100%	100%	-

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Source: Experian Goad Category Report (March 2016)

Notes: The floorspace figures are derived from the relevant Goad Plan (see Section 5).

Convenience Offer

- 8.5 There are 13 convenience units in the area audited by Experian in the latest Goad Category Report 2016, trading from a total floorspace of 6,011 sqm (64,700 sq ft.). This represents 10.0% of total units and 26.0% of total floorspace in the centre, which is above the national average of 8.8% and 15.2% respectively.
- 8.6 The town's food offer is anchored by a Tesco store, which accounts for a large percentage of the floorspace audited by Goad. The convenience provision is also supported by 4 bakers, 2 grocers, a butchers, a greengrocers, a health food shop and an off license. Whilst Shaftesbury only retains 14.2% of convenience goods expenditure in North Dorset, 13.2% of this expenditure is retained by Tesco.
- 8.7 Overall, we consider that Shaftesbury has a good convenience provision that caters well for its local catchment.

Comparison Offer

- 8.8 According to the latest Experian Report there are 49 comparison units in the centre, and provision is above the national average (37.7% compared to 31.1%). However the total comparison floorspace of 6,791 sqm (73,100 sq.ft.) represents 29.3% of total provision, which is below the national average of 35.0%. This reflects the fact that the centre has a high proportion of smaller shop units.
- 8.9 The centre's main comparison offer is characterised largely by independent retailers. Notwithstanding this, a number of multiple retailers are present; including WHSmith and Superdrug. There is a good choice of comparison goods categories in the centre including: charity shops, craft and gift shops, jewellery stores, general clothing stores, and art dealers.
- 8.10 Overall, we consider Shaftesbury to have a good comparison provision for a centre of its size, and its role and function in the retail hierarchy. The mix and type of non-food stores and the goods sold serve the needs of both local residents and the town's strong visitor and tourist market.

Service Offer

- 8.11 There are 62 service outlets in Shaftesbury Town Centre. They account for 47.8% of all units, which is broadly comparable with the national average of 48.6%. The following provides a brief summary of provision in the different service categories.

- There are 21 **retail services**, which represent 16.2% of total outlets. This is above the national average of 14.4%. This category is predominantly made up of health and beauty outlets (11) and opticians (3). Provision also includes dry cleaners, filling stations, photo processing units, post offices, travel agents, and vehicle repair and service centres.
- In terms of **financial services**, there are 23 outlets, which represents 17.7% of total units, and is significantly above the national average of 10.3%. The Goad report shows that financial services include 9 property services, 5 retail banks, 5 legal services, 2 financial services, a building society and a building supplies and services unit.
- There are also 18 **leisure service** outlets, equivalent to 13.9% of total units. This is significantly below the national average of 23.9%. Leisure provision includes a range of restaurants (5), cafés (4), fast food takeaways (3), and public houses (3) along with a hotel and a betting office.

8.12 The Shaftesbury Arts Centre, which includes a theatre and gallery, is also a popular leisure destination in Shaftesbury, and this was highlighted by stakeholders as part of our wider consultation.

8.13 In summary, we consider Shaftesbury to have a good service offer, with above average retail and financial services. The leisure offer is below the national average and there could be scope for improvement. However, this is not considered to be a major concern since the town is, regardless of this, still a popular tourist destination.

Vacancies

8.14 There were 5 vacant units recorded by Goad in 2016. This is equivalent to 3.9% which is significantly below the national average of 11.2%. This is a further indicator that Shaftesbury is performing very well in terms of vacancy levels. Nonetheless, according to key stakeholders within Shaftesbury, there is a steady turnover of shops within the town which, they identified, is largely a consequence of high rents.

Multiple and Independent Retail Representation

8.15 Whilst there are a number of multiple retailers within Shaftesbury, the centre is predominantly composed of independent retailers/service providers, of which there are 93. Such independents enable the centre to become a diverse shopping and leisure destination. In summary, we consider Shaftesbury to have a good mix of both multiple and independent retailers which serve the catchment population.

Markets

8.16 There is a regular street market held on Shaftesbury's High Street on every third Sunday of the month, where a range of comparison and convenience goods are sold including local produce. There is also a weekly flea market held in the town hall every Tuesday. According to key stakeholders within the area, both markets are popular with local people and visitors alike.

Retailer Demand & Prime Zone A Rents

8.17 The current published market demand for representation in the centre has been derived from the latest *Requirement List* (June 2017). In summary there are 6 operators with requirements, equivalent to a total minimum floorspace of 39,700 sq. ft. gross. These include retailers such as Lidl, Aldi, and The Original Factory Shop (TOFS), as well as Marstons, Vets4Pets and Travelodge. Please note that no market information was available on prime zone A rents in Shaftesbury at the time of preparing this study.

Household Survey

- 8.18 We have drawn on the findings of the household telephone interview survey (HTIS) to help gauge customers' views and perceptions of the town centre as a place to shop and visit for a range of leisure uses and other activities.
- 8.19 The survey results shows that 72.3% of respondents from the study area never visit Shaftesbury town centre. Of those who do visit the study area, 14.1% visit monthly, 12.9% visit one day a week, and only 3.3% visit daily.
- 8.20 In terms of what people 'like' about Shaftesbury town centre, the most frequently raised themes are shown in Table 8.3.

Table 8.3: Key features respondents liked about Shaftesbury Town Centre

Response	Study Area
Attractive environment/nice place	29.4%
Good range of independent shops	17.1%
Nothing/very little	14.6%
Good range of non-food shops	12.7%
Close to home	10.9%
Traditional	5.1%
High quality shops	5.0%
Good range of 'high street' retailers	4.6%
Close to work	4.5%
Good facilities in general	4.0%

- 8.21 The majority of respondents from the study area indicated that they visit Shaftesbury town centre because of its attractive environment. Other common responses to what people like about the centre include the good range of independent and non-food shops, or that it is close to home.
- 8.22 Respondents were also asked what, if anything, they would improve in Shaftesbury that would encourage them to visit more. Table 8.4 below, provides a summary of the most frequently raised suggested improvements for the town centre from respondents.

Table 8.4: Key improvements to Shaftesbury Town Centre

Response	Study Area
Nothing	61.2%
Don't know	28.4%
More/better parking	3.3%
More/better comparison retailers	1.6%
More national multiple shops	1.2%
Better access by road	0.9%
Free car parking	0.9%
More independent shops	0.9%
Less traffic congestion	0.9%

- 8.23 As shown by Table 8.4, a high proportion of respondents suggested that they were happy with the town centre as it is. Approximately 40% of respondents suggested improvements; popular suggestions included more or better parking, more or better comparison retailers and more national multiple shops.

Environmental Quality

- 8.24 Shaftesbury town centre lies entirely within the Shaftesbury Conservation Area and the majority of buildings within the centre are listed.
- 8.25 The town centre benefits from a welcoming, attractive and historic shopping environment. The well-kept shop fronts and clean shopping environment contribute to the quality of the area. Whilst street furniture within the centre is of a good quality, we consider that provision is limited. For instance, improvements to public seating provision would help to encourage longer dwell times and increased spending in the town.
- 8.26 Overall, the environmental quality of Shaftesbury is good. However we consider that there could be an opportunity to increase the provision of street furniture.

Accessibility

- 8.27 Shaftesbury Town Centre has relatively good road links; it is located close to the A350 which provides excellent access to Blandford Forum as well as surrounding residential areas.
- 8.28 There are a number of public car parks that serve the town centre including:
- Bell Street car park (95 parking spaces plus coach spaces);
 - Angel Lane car park (55 parking spaces);
 - Tesco car park (220 parking spaces); and
 - The Cattle Market overflow car park (128 parking spaces).
- 8.29 There are also some off street car parking spaces along the main street, however these are limited due to the historic street pattern and building layout. According to key stakeholders within the town, the centre lacks sufficient free off-street parking.
- 8.30 There is no railway station located in close proximity to the town centre. The nearest station is located in Gillingham, approximately 6km northwest of Shaftesbury.
- 8.31 Whilst bus routes 59, 158, 309 and X9 serve the town, services are infrequent and many services run only during school times.
- 8.32 In terms of pedestrian access through the town, narrow pavements make it difficult for visitors, particularly disabled visitors, to move around the centre. Improvements such as, for example, the introduction of a 'shared space' would help to reduce pedestrian congestion.
- 8.33 Furthermore it has also been identified that there is a lack of cycleways across the town. We consider improvements could be made to promote more sustainable modes of transportation.
- 8.34 Overall, we consider Shaftesbury Town Centre's accessibility to be relatively poor due to a lack of train station, infrequent bus service and inadequate pedestrian and cycle provision.

Out of Centre Provision

- 8.35 There is no major out of centre retail provision.

New Investment & Potential Development

8.36 According to Policy 18 ('Shaftesbury') of the North Dorset Local Plan Part 1 (2016), planning permission has been granted for the development of land to the east of the town. In addition to this, two further extensions have also been identified north of the town; these include:

- Land to the south east of Wincombe Business Park; and
- Land to the west of the A350 opposite Wincombe Business Park.

8.37 Policy 18 also identifies land for development to meet the employment needs of the town for the period of up to 2031. This includes the development of land to the south of the A30; the development of vacant sites on existing industrial estates; and the retention of existing employment sites.

Summary

8.38 In summary the health check assessment has demonstrated that overall Shaftesbury is a vital and viable centre. Some of the key strengths and weaknesses of the centre that have been identified include the following:

- The town not only supports a good range of shops, but is also a tourist and cultural destination.
- The centre has a good convenience provision which is anchored by Tesco supermarket.
- The centre's comparison offer is also good. It is mainly characterised by independent retailers including craft and gift shops, jewellery stores, general clothing stores and art dealers.
- Shaftesbury also has a good service offer with above average retail and financial service offer.
- The centre's leisure offer is below the national average.
- Vacancy levels within the town are significantly below national averages and as such Shaftesbury is considered to be performing well and is a healthy town centre.
- Environmental quality within the town is considered to be good. There may however be an opportunity to increase provision of recreational open space and street furniture.
- The town centre's accessibility is poor and we consider that improvements are needed to maintain and enhance the vitality and viability of the town.
- Due to the compact historical layout and topographical constraints, there is somewhat limited scope for retail expansion within the town centre. Nonetheless, land to the east of the town centre is the focus for regeneration to provide community facilities, and retail and housing provision. There is further development potential for housing and employment land in areas outside of the town centre.

9 STURMINSTER NEWTON HEALTH CHECK

Context

- 9.1 Sturminster Newton is an old market town situated in rural Dorset, approximately 12.6km north-west of Blandford Forum, and 23km east of Yeovil. The *North Dorset Local Plan Part 1* (2016) designates it as a 'Town Centre' and the preferred location for main town centre uses (see Policy 12 – Retail, Leisure and Other Commercial Developments). Whilst Sturminster Newton has fewer units than other town centres, the Local Plan (2016) recognises that *'it has many other facilities, such as a medical centre, a library and a community centre'* (p.135).
- 9.2 The town centre, as defined within the *Annual Monitoring Report 2005* for North Dorset, extends northwards to include the buildings to the north of Station Road; along Barnes Close and Church Street to the east; as far as Church Lane to the south; and extends westwards to include the buildings to the west of Market Cross and Market Place. The *North Dorset District-Wide Local Plan* (Saved Policies) (2003) Proposals Map defines the 'Primary Shopping Frontage' as extending along Market Cross and Market Place, as well as Station Road and the Exchange Centre. There are no defined 'Secondary Shopping Frontages'.

Retail Composition & Diversity of Uses

- 9.3 Table 9.1 below summarises the centre's overall retail and service mix and diversity of uses based on the total outlets and floorspace recorded by Experian Goad in 2015.

Table 9.1 Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	17	27.9%	31.1%	88
Convenience	5	8.2%	8.8%	94
Retail Service	11	18.0%	14.4%	127
Leisure Service	11	18.0%	23.9%	76
Financial & Business Service	10	16.4%	10.3%	157
Vacant Retail & Service Outlets	7	11.5%	11.2%	102
TOTAL:	61	100.0%	100.0%	-

Source: Experian Goad Category Report (September 2015)

Table 9.2 Current Retail and Service Offer - Floorspace

Category	Floorspace (sqm)	% of Total Outlets	UK (%)	Index
Comparison	2,964	32.9%	35.0%	93
Convenience	1,709	19.0%	15.2%	125
Retail Service	920	10.2%	6.8%	151
Leisure Services	1,171	13.0%	25.0%	53
Financial & Business Service	1,524	16.9%	7.7%	216
Vacant Retail & Service Outlets	715	8.0%	9.7%	85
TOTAL:	9,003	100.0%	100%	-

Source: Experian Goad Category Report (September 2015).

Convenience Offer

- 9.4 There are 5 convenience units in the survey area according to the latest 2015 Experian Goad Category Report, trading from a total (Goad) floorspace of 1,709 sqm (18,400 sq ft.). This represents 8.2% of total outlets, which is slightly below the national average of 8.8%, and 19% of total floorspace, which is above the national average (15.2%). The Experian Goad figures therefore point to an adequate provision of food and convenience retailers in the surveyed area.
- 9.5 The centre's food offer is anchored by Co-op on Station Road. The Co-op also has an area of free car parking for shoppers. The town's overall convenience offer is also supported by a butchers, a greengrocers, and a delicatessen.
- 9.6 Overall, we consider that Sturminster Newton has an adequate convenience provision that serves the needs of the local population.

Comparison Offer

- 9.7 According to the 2015 Goad Category Report, Sturminster Newton has 17 comparison outlets trading from a total floorspace of 2,964 sqm (31,900 sq ft.). This represents 27.9% of total units and 32.9% of total floorspace, which is below the respective national averages of 31.1% and 35.0%.
- 9.8 Across the different comparison sub-categories, the centre has a representation of a number of different categories including charity shops, chemists, crafts stores, DIY and home improvement stores, newsagents, electric good stores, florists, and textiles and soft furnishing stores. Boots is the only multiple comparison retailer in the centre. The centre also consists of a department store, Harts of Stur, which specialises particularly in cookware and kitchenware.
- 9.9 Although Sturminster Newton is identified as having an under-provision of comparison goods shops and multiples, this reflects its role and function in North Dorset's hierarchy and network of centres. Subject to capacity and market demand, there could be an opportunity to improve both the quality and quantity of comparison provision in order to attract visitors to the centre, and further meet the needs of the local population.

Service Offer

- 9.10 Service businesses are defined by Experian Goad as including retail, professional and financial services. There were 32 service outlets in Sturminster Newton in 2015, trading from a total floorspace of 3,615 sqm (38,900 sq ft.). This represented 52.5% of all units in the centre and 40.1% of total floorspace, which was above the respective national averages of 48.6% and 39.5%.
- 9.11 The following provides a brief summary of provision in the different service categories:
- There were 11 **retail services**, which represented 18.0% of total outlets and is above the national average of 14.4%. This category is mostly made up of 5 health and beauty outlets. There was also opticians (2), a post office and a travel agents.
 - In terms of **financial services**, there were 10 outlets. This represented 16.4% of total units and was significantly above the national average of 10.3%. The mix of services was mostly made up of property services (4), retail banks (3) and financial services (2). However two of the centre's banks (Barclays and Natwest) have closed since 2016, and Lloyds Bank also closed in 2017 and this is a cause for concern. There are no banks remaining in the town centre however Lloyds offer a mobile service three times per week.

- There were 11 **leisure service** outlets. This is equivalent to 18.0% of total provision and is below the national average of 23.9%. The leisure offer at this time consisted of fast food takeaways (4), cafes (2), public houses (2), restaurants (2) and a betting office. Leisure service provision has remained largely unchanged since 2015. One of the town's largest leisure draws is the Exchange, which is a multi-functional venue with a main theatre capable of seating 300.

9.12 Overall, whilst we consider that Sturminster Newton has a relatively good retail service offer, the decline in financial services and the lack of a strong leisure service offer is a cause for concern. We consider that the centre's service offer should be improved, subject to market demand, as this will help to attract more visitors to the centre as well as creating more of a night time economy.

Vacancies

9.13 There were 7 vacant units recorded by Goad in 2015. This was equivalent to a vacancy level of 11.5% in 2015, which was slightly above the national average of 11.2%. North Dorset District Council also completed an audit of the centre in December 2017 and recorded 9 vacant units.

9.14 We also note that since 2015 Natwest (2016), Barclays (2016) and Lloyds (2017) have all closed. The White Hart public house is also now vacant. Both Lloyds Bank and the public house are relatively large units in the main centre.

9.15 In comparison to other comparable centres in the study area, for example Blandford Forum and Shaftesbury, vacancy levels in Sturminster Newton are significantly higher. This was also raised by our discussions with key stakeholders, who highlighted the relatively high 'churn' of businesses. This was identified as a key issue within the town.

Multiple and Independent Retail Representation

9.16 The Experian Goad Category Report identified there were 10 multiples in the surveyed area in 2015. The main multiples in the centre currently include a number of prominent names, such as the Co-op, and Boots. Notwithstanding this, the centre is predominantly characterised by the large number of independent retailers/service providers that account for approximately 83.6% of occupants. In summary, the independent stores contribute significantly to the overall diversity, vitality, and viability of the town centre's offer, and as such are considered to be one of the town's key strengths.

Markets

9.17 Sturminster Newton Town Council runs a local market on a Monday, which is also a key attraction and strength of the town. There is also the Fayre Exchange Craft and Produce Market held in The Exchange on the first Saturday of the month between 9am and 1.30pm. The stalls include a wide range of arts, crafts and local products by local producers.

Retailer Demand & Prime Zone A Rents

9.18 No market information was available on retailer requirements and prime Zone A rents in Sturminster Newton at the time preparing this study.

Environmental Quality

- 9.19 Sturminster Newton town centre lies entirely within the Sturminster Newton Conservation Area and many of the buildings within the town centre are listed, particularly along Market Cross, Market Place, and Church Street.
- 9.20 The town centre benefits from an attractive and pleasant shopping environment. It is a small traditional market town with a mix of 17th/18th century and Georgian architecture, which complements the traditional nature of the town. This is supported by the more modern architecture seen at The Exchange. The well-kept shop fronts, and planting throughout the town all help to enhance the distinctive character of the centre.
- 9.21 There is regular seating within the town centre, and green open space is present. One area of green open space considered to be of a high quality was Railway Gardens, close to The Exchange.
- 9.22 Overall, it is considered that the environmental quality of Sturminster Newton Town Centre is good and this contributes significantly to the vitality of the centre.

Accessibility

- 9.23 Sturminster Newton has good access by car; it is located approximately 8km from the A350 and has relatively good 'B' road links. Accessibility and movement across the centre is rather more limited however; the town's narrow streets only allow for one car to pass through at a time resulting in some congestion within the centre. Notwithstanding the issues of movement across the centre there are ample car parks within the town including:
- Butts Pond (11 spaces);
 - Church Street (18 spaces); and
 - Station Road (82 spaces).
- 9.24 There is no railway station located in close proximity to the town centre. The nearest station is at Templecombe or Gillingham, which is an approximately 20 minute journey away by car. There is an adequate bus service, which operates services to the towns of Stalbridge, Dorchester, Blandford, Gillingham, Sherborne, and Yeovil approximately 4-6 times per day. Discussions with key stakeholders during the CJ site visit revealed that many believe public transport to be a limited service that is in decline.
- 9.25 Pedestrian accessibility within the centre is also relatively limited due to the town's narrow pavements. This is particularly an issue for those with disabilities and therefore the centre could benefit from improvements in this area. Nonetheless, pedestrian accessibility into and out of the town is good; the North Dorset Trailway runs from Blandford Forum to Sturminster Newton, ending at the Station Road car park, providing an off road trail for walkers, cyclists and horse riders. The trail follows the route of the old Somerset and Dorset railway which went through a large number of agricultural villages and towns where there were stations every few miles.
- 9.26 Overall, Sturminster Newton's accessibility is considered to be adequate to poor. Whilst the centre has reasonable road links, the town's streets and pavements are narrow creating vehicular and pedestrian congestion. Furthermore, there is no railway station and the centre's public transport service is limited and declining. As such, we consider accessibility improvements could be important in order to maintain the town's vitality and viability.

Out of Centre Provision

- 9.27 There is no out of centre retail provision.

New Investment & Potential Development

- 9.28 The submission draft *Sturminster Newton Neighbourhood Plan* makes provision for in excess of 395 new homes over the period 2011 to 2031. This includes allocating the following sites identified in the North Dorset Local Plan Part 1 (2016) for housing :

- Land in and around the Station Road area as part of the regeneration of this site;
- Land at Market Fields, north of the town centre;
- Land at North Honeymead Field, to the north of Northfields; and
- Land to the east of the former Creamery Site, south of Elm Close.

- 9.29 Employment needs in the town for the period up to 2031 will be met through the following Local Plan allocations:

- The development of North Dorset Business Park; and
- The retention of Butts Pond Industrial Estate.

- 9.30 The draft Neighbourhood Plan also allocates a number of other sites, including two brownfield sites (the former Council office, north of Stour Close View and William Barnes Primary School site), which together could deliver approximately 56 homes and identifies two 'reserve' sites (land on the north side of Manston Road, east of Northfield and land south of Bull Ground Lane at Elm Close Farm) for around an additional 90 homes.

- 9.31 Furthermore, the draft Neighbourhood Plan identifies a number of vacant or underused sites in the northern part of the town centre area. The main sites with development potential comprise:

- Land south of Station Road (see the *Station Road Area Design & Development Brief 2008*²⁷), including Streeters, Hansons, The Original Factory Shop and the Station Road car park;
- Land around the junction of Bath Road and the B3091 (the main site known as Clarkes Yard);
- Land adjoining Clarkes Yard currently occupied by the Police Station/ Library; and
- Land at the eastern end of the Medical Centre.

Summary

- 9.32 In summary the health check assessment has demonstrated that whilst Sturminster Newton is performing well against a number of the PPG KPIs, the number and range of retail and town centre uses within the centre is much weaker than other town centres in North Dorset and vacancy levels are increasing following the closure of its main high street banks.

- 9.33 The key strengths and weaknesses of the centre we have identified include the following:

²⁷ Note the Sturminster Newton Neighbourhood Plan proposes that the Station Road Area Design & Development Brief 2008 will be superseded by guidance in the neighbourhood plan.

- It has an adequate convenience provision. The town's food offer is anchored by a Co-op store and this is supported by a butchers, a greengrocers and a delicatessen.
- The town has a relatively weak comparison offer and there could be an opportunity (subject to market demand) to improve both the quality and quantity of provision to attract visitors and further meet the needs of the local population.
- Sturminster Newton's service provision is above the national average, but there is a concern around the decline in financial services.
- Whilst The Exchange is a significant draw for the centre, bringing in visitors from the town and the wider area, there is an opportunity to improve upon the centre's leisure offer in terms of eating and drinking establishments in order to enhance the early evening and night time economy.
- Whilst vacancies are not necessarily an issue within the centre at the present time, we advise that this should be monitored closely as stakeholders identified a relatively high 'churn' of shops due to perceived high rents.
- The centre is defined predominantly by the large number of independent retailers/service providers which add to the town's diversity and attraction. Local traders also sell a range of arts, crafts and food produce at the town centre markets.
- The town's environmental quality is good and is one of its key strengths.
- Sturminster Newton's accessibility is considered to be adequate to poor; in particular we consider that there is an opportunity to improve upon the town's limited and declining public transport service.
- In excess of 395 new homes are to be provided at Sturminster Newton between 2011 and 2031 with a number of sites within and adjacent to the town being identified in the submission draft neighbourhood plan for redevelopment/development. This would increase the town's population and as such generate greater spending that should be available to the centre, its shops and businesses.

10 STALBRIDGE HEALTH CHECK

Context

- 10.1 The town of Stalbridge, the smallest in Dorset, is situated in the Blackmore Vale area of North Dorset district and supports Sturminster Newton (4 miles to the south east) in serving the shopping, leisure and service needs of the population to the west of the district. The other nearest towns are Sherborne, which is located 6 miles to the west, and Shaftesbury, which is 7 miles to the north east.
- 10.2 The town centre, as defined within the *Annual Monitoring Report 2005* for North Dorset, takes a rather linear form and extends as far as St. Mary's Church on Church Hill to the north, and as far as Little Westminster Cottage on Ring Street to the south. The *Local Plan* (2003) does not designate any PSFs or SSFs. From our research and sites visits it is apparent that the main shopping areas are located on High Street, Ring Street and Station Road.

Retail Composition & Diversity of Uses

- 10.3 Table 10.1 below summarises the centre's current retail/service mix and diversity of uses based on online sources and our 2017 site visit (as there are no Experian Goad reports or plans available for the centre).

Table 10.1 Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	8	28.6%	31.1%	79
Convenience	2	7.1%	8.8%	123
Retail Service	4	14.3%	14.4%	101
Leisure Service	3	10.7%	23.9%	45
Financial & Business Service	1	3.6%	10.3%	34
Vacant Retail & Service Outlets	10	35.7%	11.2%	319
TOTAL:	28	100.0%	100.0%	-

Source: CJ Audit (2017) and Google Maps (July 2016)

Convenience Offer

- 10.4 There are two convenience units in the centre. This represents 7.1% of total units and is below the national average of 8.8%. The main food store is the Dike & Son supermarket (a member of Nisa), supported by an independent butchers. Dike & Sons is an important anchor to the town's retail and service offer. It has an attraction and role above what would be normally expected for a store in a small town, and this is explained by its brand and customer loyalty. This is supported by the findings of the survey-derived market shares, which identified that although Stalbridge was retaining a market share of just 0.3% within the North Dorset area, Dike & Son was achieving a relatively strong market share within zone 9.
- 10.5 Overall we consider that the centre has an 'average' convenience provision mainly catering for the more frequent 'top-up' shopping needs of the local catchment population, as well as the population of surrounding areas. It is therefore important that the attraction and performance of Dike & Son is maintained in the future, and potential competition from out-of-centre stores are resisted.

Comparison Offer

- 10.6 There are 8 comparison units in the surveyed area, which represents 28.6% of total outlets and is below the national average of 31.1%. The centre's comparison offer is wholly characterised by independent comparison retailers. A variety of comparison goods categories are represented, including charity shops (2), craft and gifts shops (2), a newsagents, a pharmacy, a florist and a cycle shop. Overall, although comparison provision in Stalbridge is below the national average, we consider it adequately meets the needs of the local resident catchment.

Service Offer

- 10.7 There are 8 service outlets in Stalbridge. They account for 28.6% of all units compared to the national average of 48.6%. The following provides a brief summary of provision in the different service categories.
- There are 4 **retail services**, which represent 14.3% of total outlets. This is in line with the national average of 14.4%. A mix of retail services are represented including an opticians, a beauty salon, a hairdressers and a post office.
 - There is only one **financial service** business – an accountancy firm - which represents 3.6% of total units. This is significantly below the national average of 10.3%. There are no banks within Stalbridge, which represents a weakness in its overall provision as banks help to generate trips, footfall and linked spending for other shops and facilities.
 - There are 3 **leisure service** outlets, which is equivalent to 10.7% of total units and is significantly below the national average of 23.9%. The provision is made up of 2 fast food takeaways and a public house. Aside from Dike and Sons which comprises a licensed café, the centre is lacking any restaurants and cafés, which again represents a gap in its overall provision.
- 10.8 In summary, we consider Stalbridge has a relatively poor service offer, with below average financial and leisure service provision. If current trends continue, it is likely that service provision will fall even further in the future.

Vacancies

- 10.9 We identified 10 vacant units in the town at the time of our site visit. This is equivalent to a vacancy level of 25.7%, which is significantly above the national average of 11.2%. The high number of vacancies in Stalbridge is a concern and does raise questions as to the centre's overall vitality and viability. The majority of the vacant units are located along High Street and a number of vacant units appear to be in poor condition. For example The Crown Inn is a large public house which appeared run down during the time of the site visit, as well as the former Sanders store which was boarded up.

Multiple and Independent Retail Representation

- 10.10 The centre is comprised wholly of independent businesses/service providers. Whilst these businesses contribute to the centre's retail offer and diversity, the health of the centre is deteriorating and as such it has been recognised that they do not contribute enough to its vitality and viability.

Markets

- 10.11 There are no markets within Stalbridge.

Retailer Demand & Prime Zone A Rents

- 10.12 No market information was available regarding retailer requirements and Prime Zone A rents in Stalbridge at the time of preparing this study.

Environmental Quality

- 10.13 The town centre is entirely covered by the Stalbridge Conservation Area and it contains a number of listed buildings along Ring Street, Gold Street and Lower Road. Notwithstanding this, we consider that Stalbridge's environmental quality is in need of investment and improvement. Although shop fronts and units are reasonably well maintained across the centre, some shows signs of deterioration and would benefit from some modernisation in our view. Also, whilst the centre is clean and tidy throughout, there is limited street furniture. There is, in particular, a lack of seating and a shortage of litter bins along High Street.
- 10.14 Whilst there is a lack of green open space across the centre, the only green spaces being at the junction of Ring Street and Lower Road, it would not be possible to incorporate more space due to the physical constraints of the centre. Furthermore, there is little tree planting within Stalbridge; although additional tree planting may not be possible in the centre, again, due to physical constraints, flower boxes and hanging baskets could make the centre more vibrant and welcoming, making it more attractive to visitors.

Accessibility

- 10.15 Stalbridge is situated on the A357 road and therefore there is relatively good access to nearby towns such as Templecombe and neighbouring villages. Vehicular access within the centre is considered to be adequate, since the narrow road width on Ring Street means that vehicles must give way to oncoming vehicles. The Station Road car park is the only car park within the centre and it is operated by Stalbridge Town Council. This provides the centre with 63 free parking spaces including 6 disabled spaces.
- 10.16 Stalbridge does not have a railway station; the nearest station is at Templecombe, which is approximately 3.6 miles from the town. A number of bus services run through Stalbridge including the 58A and the 59 which link the town to Yeovil and Wincanton, and the X10 service which links the town to Wincanton and Blandford. These bus routes are subject to a rather limited timetable and some services run at school times and some only Monday to Friday.
- 10.17 Pedestrian access within the centre is somewhat limited due to narrow pavements. Footfall within the centre also appears rather low based on our site visits. Pedestrian accessibility into and out of the centre however is good. Whilst the largest section of the North Dorset Trailway extends from Blandford Forum to Sturminster Newton, additional sections include a short stretch open at Stalbridge. It is hoped one day that all sections, including Stalbridge, will join up to provide public access along the whole length of the old Somerset and Dorset railway line.
- 10.18 Overall, we consider accessibility in Stalbridge is relatively poor.

Out of Centre Provision

- 10.19 There are no major out of centre provisions outside of Stalbridge.

New Investment & Potential Development

- 10.20 According to the North Dorset Local Plan Part 1 (2016), a minimum of 825 dwellings out of 5,700 dwellings district-wide will be provided in the countryside during the period 2011-2031; a number of these are expected to be in or close to Stalbridge. Furthermore, the Local Plan explains that a new or relocated community hall may be permitted on the edge of the built-up area of Stalbridge, if it can be demonstrated that there is a need for the facility and no suitable sites exist within the relevant settlement.
- 10.21 The North Dorset Local Plan Review Issues and Options Consultation (November 2017) document has sought views on the existing spatial strategy, as set out in the North Dorset Local Plan Part 1 (2016), being amended to allow for a limited scale of growth, rather than just providing for growth focussed on meeting local needs. The consultation document sets out that allowing for some limited growth at Stalbridge would provide the Council with a greater level of flexibility in terms of identifying potential sites to assist in meeting the local housing need figure as well as benefiting the vitality and viability of the of Stalbridge. The areas of search listed as having possible development potential (although these search areas will be subject to further detailed consultation) are:
- Land between A357 and Station Road;
 - Land between Station Road and Lower Road;
 - Land between Lower Road and Thornhill Road; and
 - Land between Thornhill Road and Barrow Hill.
- 10.22 Planning applications have been determined for proposed developments at Stalbridge on sites within three of these areas of search as follows:
- Outline application for up to 98 dwellings, dedicated open space and associated works with vehicular access from Barrow Hill (up to 20 dwellings), Grosvenor Road (30 dwellings) and from Waterlake (48 dwellings) (ref: 2/2017/1094/OUT). The site is situated on the western edge of Stalbridge, outside of but adjacent to the defined settlement boundary. This application was submitted in July 2017 and refused in February 2018
 - Outline application for up to 60 dwellings, dedicated open space and associated works with vehicular access from Thornhill Road (ref:2/2017/1095/OUT). The site is situated to the east of Thornhill Road to the southern edge of Stalbridge. This application was submitted in July 2017 and approved in February 2018.
 - Outline application for up to 120 dwellings with public open space and vehicular access from Lower Road (ref: 2/2017/0741/OUT). The site is situated at land off Lower Road, Stalbridge. This application was submitted in May 2017 and approved in February 2018.

Summary

- 10.23 In summary, the health check assessment has demonstrated that overall Stalbridge is not a vital and viable centre for a number of reasons:
- Convenience and service provision in Stalbridge is below the national average, and if current trends continue, it is likely that its offer will fall even further in the future.
 - Dike & Son is a key anchor to the centre's retail and service offer, and its role, function and attraction needs to be maintained and possibly enhanced over the plan period to help ensure the centre's overall vitality and viability.
 - Whilst comparison provision is also below the national average, we nevertheless consider that it does meet the needs of the local catchment population.

- Vacancy levels are significantly higher than the national average.
- The centre is occupied by independent businesses which, in our judgement, do not contribute enough to its overall vitality and viability.
- The centre's environmental quality is in need of improvement. Whilst shop frontages are relatively well maintained, some would benefit from modernisation and the centre requires additional street furniture, and planting.
- Accessibility in Stalbridge is considered to be poor; there is no nearby railway station and the bus service is infrequent.
- Pavements within the centre are narrow and, as a result, pedestrian accessibility and movement across Stalbridge is restricted.
- A number of the 825 new dwellings that are proposed in the District's countryside are expected to be located in or close to Stalbridge. This should help to generate increased expenditure to support the centre's existing shops and stores.

11 WEYMOUTH HEALTH CHECK

Context

- 11.1 Weymouth is situated on the coast at the mouth of the River Wey, some 7 miles south of Dorchester. It is the largest centre in Weymouth and Portland Borough and is the borough's main shopping destination. Within the Local Plan area, it is defined as a main town centre within West Dorset District and Weymouth & Portland Borough. It is also a well-known and popular tourist destination. According to the West Dorset, Weymouth and Portland Local Plan (2015) Weymouth attracts around half a million staying visitors each year. Weymouth's distinctive setting comprising a mix of coast, marina and port is a key factor that attracts visitors to the centre.
- 11.2 The 2015 Local Plan vision for Weymouth sets out that by 2031 Weymouth will have a regenerated town centre and seafront with: (i) improved flood defences; (ii) a mix of uses to make it more interesting and viable; and (iii) accessible and attractive public spaces. The plan envisages that Weymouth will be a vibrant place, appealing to a range of different people during the day and after dark.
- 11.3 Javelin Venuescore²⁸ ranks the centre as 232nd of the UK's retail venues in 2016/17. This ranking is just below Dorchester which is placed 217th. The relatively small difference between the two sub-regional centres suggests they are performing similarly. All of the surrounding competing centres are ranked much higher in terms of location grade and venuescore, representing the threat that these centres cause to the vitality and viability of Weymouth (and Dorchester) town centre. However, it should be considered that Weymouth provides a unique additional offer in terms of its beach, seafront setting and harbour.

Table 11.1 Competing Centres

Town Centre	Location Grade	Venuescore Rank
Exeter	Major Regional	22
Bournemouth	Regional	72
Taunton	Regional	90
Salisbury	Regional	94
Poole	Regional	112
Yeovil	Regional	160
Dorchester	Sub-Regional	217
Weymouth	Sub-Regional	232
Swindon	Regional	72

Source: Javelin Venuescore (2016)

- 11.4 Weymouth's town centre follows a grid-like street pattern. The town centre boundary includes the railway station and King Street to the north of the centre, and the area between The Esplanade to the east and the Marina to the west. To the south the boundary encompasses the harbour area across the bridge including the former Council offices, units along Trinity Road and units bound by Newberry Gardens, Spring Road and Hope Street (including Brewers Quay).

²⁸ Venuescore is Javelin Group's annual ranking of the UK's top 3,000+ retail venues based on provision of multiple retailers including anchor stores, fashion operators, and non-fashion multiples, where each operator is given a weighted score to reflect its overall impact on shopping patterns and the attraction of centres. The Market Position Index measures the degree to which the centre's offer has a high-end or discount focus (High=Bias towards High-end retailers; Low=Bias towards Discount-oriented retailers)

- 11.5 The PSA comprises the streets defined as primary shopping frontages (i.e. St Mary Street, the north end of St Thomas Street and New Bond Street), along with the units along the southern end of St Thomas Street and the area east of Commercial Road. The SSF comprises The Esplanade, Westham Road, St Alban Street, the south end of St Thomas Street, Custom House Quay and Trinity Road.

Retail Composition & Diversity of Uses

- 11.6 Tables 11.2 and 11.3 below summarise the centre's retail and service mix, and diversity of uses based on the total outlets and floorspace recorded by Experian Goad.

Table 11.2: Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	132	34.8%	31.1%	112
Convenience	25	6.6%	8.8%	75
Retail Service	41	10.8%	14.4%	75
Leisure Service	112	29.6%	23.9%	124
Financial & Business Service	30	7.9%	10.3%	77
Vacant Retail & Service Outlets	38	10.0%	11.2%	89
TOTAL:	379	99.7%	100.0%	-

Source: Experian Goad Category Report (March, 2017)

Table 11.3: Current Retail and Service Offer- Floorspace

Category	Floorspace (sqm)	% of Total Outlets	UK (%)	Index
Comparison	24,183	36.9%	35.0%	106
Convenience	3,038	4.6%	15.2%	31
Retail Service	3,800	5.8%	6.8%	85
Leisure Services	23,997	36.6%	25.0%	147
Financial & Business Service	4,125	6.3%	7.7%	81
Vacant Retail & Service Outlets	6,382	9.7%	9.7%	100
TOTAL:	65,525	99.9%	100%	-

Notes: The floorspace figures are derived from the relevant Goad Plan (see Section 5).

Source: Experian Goad Category Report (March, 2017)

Convenience Offer

- 11.7 There are 25 convenience units in the survey area according to the latest 2017 Experian Goad Category Report, trading from a total (Goad) convenience floorspace of 3,038 sqm. This represents 6.6% of total units and 4.6% of recorded floorspace, which is below the respective national averages of 8.8% and 15.2%.
- 11.8 The main supermarket in the town centre is Tesco Metro. The other convenience provision comprises 8 bakers and confectioners, a butchers, a confectionary, tobacco and news store (CTN), 2 smaller convenience stores, a frozen food store (Iceland), a greengrocers, 5 grocers and delicatessens, 3 health food stores and 2 shoe repair shops. There is also an M&S Food Hall. Surprisingly given the coastal and port location of Weymouth, no fishmongers were recorded in the 2017 audit which is surprising considering the coastal setting

of the town. However, we understand that there is a fishmongers at Custom House Quay (Weyfish) as well as a number of fishmongers located outside of the centre boundary, but within walking distance of the town centre.

- 11.9 The in-centre survey results identified that just 10.5% or 9 respondents were in the town centre for food shopping. Of those that were food shopping, approximately 5 respondents intended to visit Tesco Metro, 4 intended to visit Iceland and 1 respectively intended to visit Marks and Spencer and Aldi situated outside of the town centre (please note the survey allowed for multiple responses). Approximately 44.4% of respondents who were in the centre to shop for food goods said they intended to link their food shopping trip to a non-food shop, whereas 55.6% said they did not intend to link their trip.
- 11.10 Notwithstanding the town centre's relatively limited food and convenience offer, there are a number of larger stores situated on the edge of, and outside of the defined town centre boundary that predominantly cater for the main 'bulk' and 'top-up' food shopping needs of the catchment and tourist population (namely Morrisons, Asda, Sainsbury's, Lidl and Aldi). Due to their number, scale and range of products sold, these food stores are achieving a much higher market share and convenience goods turnover than the town centre; a total market share within the Weymouth & Portland Borough area of 70.8% compared with the town centre's 6.5% share. Subject to forecast need, operator demand and the availability of suitable sites, we consider that the development of new food stores should be directed to the town centre first in accordance with the sequential approach to help strengthen its competitive position as a food shopping destination.

Comparison Offer

- 11.11 There are 132 comparison goods retailers located in the town centre trading from a total (Goad) floorspace of 24,183 sqm. This represents 34.8% of total units surveyed, and 39.6% of all floorspace, which is above the national averages of 31.1% and 35.0% respectively.
- 11.12 There are a wide range of non-food shops and goods represented in the town centre including: books, charity shops, crafts and gifts, department stores, electricals, florists, footwear, hardware and household goods, jewellery, clothing, sports and leisure goods, telephones and accessories, toiletries and beauty products and toys. In terms of specific categories of goods that are well represented:
- There are 25 **craft and gift stores** which is an indicator of the town's role as a tourist destination. This represents 6.60% of total stores compared to a national average of 1.62%;
 - There are 5 shops selling **toys, games & hobbies** goods. This represents 1.32% of total stores compared to a national average of 0.77%;
 - There are some 4 **footwear** retailers. This represents some 1.06% of all outlets in the town centre, which is above the national average of 0.99%; and
 - There are also 8 **jewellery, watches and silver goods** retailers. This represents some 2.11% of total stores compared to the national average of 1.62%.
- 11.13 The centre's retail offer is also anchored by two department/variety stores, namely Debenhams and Marks and Spencer. Asda, on the edge of the centre, also sells a range of comparison goods.
- 11.14 The centre's multiple retailers are mainly located on New Bond Street, the northern/central section of St Thomas Street and much of St Mary Street, whereas the rest of the centre comprises mainly independent retailers.
- 11.15 The in-centre survey results show that only 14.0% of all respondents interviewed were in the centre to buy non-food goods. Of these, 41.7% intended to visit Argos, 25.0% intended to visit Marks and Spencer, and

16.7% respectively visited Wilko and Peacocks. This low proportion of respondents visiting the centre for this purpose is representative of the high number of respondents in the centre as either day or overnight visitors.

- 11.16 The results of the market share analysis reflected Weymouth's relatively strong retention rate within the borough (48.8%), i.e. the retention of shopping and leisure trips and ultimately expenditure, which is measured through the results of the HTIS. Although the centre's retention rate within the overall study area was relatively low (11.9%) we consider that this is because of Weymouth's localised catchment area.
- 11.17 Overall, Weymouth benefits from a strong comparison goods offer that appeals to the needs of both tourists and local visitors. Debenhams and Marks and Spencer are two key anchor stores that help to underpin the centre's overall vitality and viability by attracting visitors to the town centre, but other retailers also make an important contribution to the towns overall attraction and performance as a shopping destination (including Argos, Wilko and Peacocks).

Service Offer

- 11.18 As the table shows, there are 183 service outlets in Weymouth town centre. They account for 48.3% of all units which is in line with the national average of 48.6%.
- 11.19 The following provides a brief summary of provision in the different service categories:
- There are 41 **retail services**. This represents 10.8% of total outlets, which is below the national average of 14.4%. Retail service provision is mainly dominated by health and beauty outlets (28). Other services comprise a dry cleaners/laundrette, 6 opticians, a photo processing shop, a post office and 3 travel agents. Although the proportion of retail services is below the national average, we consider that the range of services in the centre is adequate and meets the needs of local residents and the centre's tourists/visitors.
 - There are 30 **financial services** outlets. This represents 7.9% of total units, which is below the national average of 10.3%. Financial services includes a building society, 4 financial services, 3 legal services, 13 estate agents and 6 retail banks (including Barclays, HSBC, Nationwide, Santander and Halifax).
 - There are 112 **leisure** service outlets. Total provision represents 29.6% of total units, which is above the national average of 23.6%. Leisure provision comprises 10 bars, 1 bingo/amusement centre, 32 cafés, 7 casinos/betting offices, 1 cinema (operated by Cineworld on New Bond Street), 3 nightclubs, 13 takeaway shops, 9 hotels/guesthouses, 15 public houses, 15 restaurants and 2 sports/leisure facilities. The range of leisure outlets in the centre reflects the centre's wider role as a tourist and visitor destination. Many of these leisure uses are situated along The Esplanade on the seafront, as well as on Custom House Quay and Trinity Road along the harbour front which we consider to be an ideal location due to the unique setting.
- 11.20 Weymouth benefits from a wealth of leisure attractions which are predominately targeted towards visitors to the centre. It should be noted that the Pavilion Theatre, situated to the south of The Esplanade, and the Jurassic Skyline tower are not included within the Goad audited area. The Sea Life Centre is also situated outside of the town centre to the south.
- 11.21 Given the size and role of the centre, we consider that the overall representation of financial and retail services is adequate, despite being below the national average. In terms of leisure, Weymouth has a wide choice of independent and multiple restaurants, cafes and pubs that contribute to a relatively strong evening and night time economy. The Pavilion Theatre and amusements are particularly popular to tourists.

Vacancies

- 11.22 Experian identified 38 vacant units in Weymouth in 2017. This was equivalent to 10.0% vacancy level, which is below the national average of 11.2%. Although vacancy levels are relatively low, we noted during our site visits that there are a number of larger vacant buildings across the town centre, including the old Council offices which overlook the harbour on North Quay and Maiden Street Methodist Church, which was part destroyed by a fire in 2002. Permission was granted for the redevelopment of the former Council offices in July 2016 (ref: WP/15/00031/OUT) comprising both residential and commercial uses.
- 11.23 Brewery Quay (former Devenish Brewery building) is a grade II listed building located in Hope Square close to the harbour and was vacant at the time of our visit. An application for planning permission was approved at this site in November 2016 (ref: WP/14/01064/FUL) for the redevelopment of the building to comprise residential uses, along with a museum and leisure uses.
- 11.24 There are concentrations of smaller vacant units along St Thomas Street as well as a larger unit that was previously occupied by Poundland (which has relocated to New Bond Street). On St Mary Street there are a number of smaller vacant units predominately located along the northern section of the street.

Multiple and Independent Retail Representation

- 11.25 The 2017 Goad Category Report, identified that there are 108 multiple retailers in the surveyed area. The wide range of multiple operators include: Debenhams, Marks and Spencer, Argos, Boots, TK Maxx, WH Smith, Wilkos, Tesco, Dorothy Perkins, New Look, Carphone Warehouse, Clarks, 02, Superdrug, JD Sports, Monsoon, Accessorize, Costa Coffee, Caffe Nero, Peacocks, Costa, Pandora, Bonmarche and Greggs.
- 11.26 There is also a good mix of independent retailers selling a wide range of goods, along with independent service providers, including cafés and restaurants. The wide range and choice of independents should be maintained and strengthened, as they make a significant contribution to the overall attraction, vitality and viability of the town centre.

Markets

- 11.27 Weymouth market operates every Thursday between 9am and 4pm from Easter to autumn. The market is held on the Swannery Car Park. It has a range of stalls selling products ranging from clothing, household goods, plants and fresh fish, meat and veg.
- 11.28 The harbour area is also often used for events throughout the year, including the Folk Festival and the Dorset Seafood Festival. These popular festivals are both held during summer months and attract visitors from the wider area to Weymouth town centre.

Retailer Demand & Requirements

- 11.29 According to the latest *Requirement List* (June 2017) there are 24 operators with published requirements; equivalent to a total minimum floorspace of 9,970 sqm (107,350 sq ft) gross. In summary, there are two requirements from discount food retailers; namely Lidl and Farmfoods. In general, the requirements are mainly from budget/value retailers and charity shops including: Select, Poundworld, Savers, E Cigarette Direct and Cats Protection. There are also requirements from a range of food and beverage, hotel, and gym operators, including: Travelodge, McDonalds, Snap Fitness, Taco Bell, Pizza Hut Delivery and Marstons.

Prime Zone A Rents

- 11.30 The November 2017 *PROMIS Retail Report* states that at mid-2017 estimated Zone A prime rents in Weymouth stood at £55 per sqft (psf) Zone A, which represented no change from the levels achieved in 2016. Prime Zone A rents are 31.3% below the pre-recession peak of £80 psf. This compares with the average prime rents across the 200 towns monitored by PROMIS, which are some 27.9% below the pre-recession peak.

Household Survey

- 11.31 We have drawn on the findings of the household telephone interview survey (HTIS) to help gauge customers' views and perceptions of the town centre as a place to shop and visit for a range of leisure uses and other activities.

Table 11.4: Features respondents liked about Weymouth town centre

Response	Study Area
Nothing/very little	33.1%
The beach	16.0%
Close to home	15.0%
Attractive environment/nice place	11.5%
Good range of non-food shops	6.4%
Good range of independent shops	4.3%
Good range of High Street/multiple retailers	3.7%
Good pubs, cafes or restaurants	3.6%
Don't know	3.4%
Compact	2.5%

- 11.32 Although the majority (33.1%) of respondents stated that they liked 'nothing/very little' about Weymouth town centre, some 16% indicated that the beach was a major attraction, and a further 11.5% identified the centre's attractive environment. Other features respondents liked about the town include the range of non-food shops, high street stores and the choice of food and beverage operators.
- 11.33 Respondents were also asked what, if any improvements to Weymouth would encourage them to visit more. The table below provides a summary of the most frequently suggested improvements.

Table 11.5: Key improvements for Weymouth town centre

Response	Study Area
Nothing	42.9%
Don't know	15.9%
More national multiple shops/High Street shops	9.6%
More independent shops	9.4%
Free car parking	6.8%
More/better parking	6.4%
Make it look more attractive/revamp	4.7%
Cleaner streets	4.4%
More/better comparison retailers	3.5%
Less empty shops	2.3%

- 11.34 The majority of respondents across the study area stated 'nothing' or 'don't know' (58.8%). Of those that did identify improvements, some 13.1% called for more high street and comparison retailers, and 9.4% wanted

more independent shops. Respondents also commented on the need for free parking, as well as more/better parking; although it should be noted that the findings of the health check considered there to be an adequate amount of car parking across the town centre. The need to improve/revamp the environment and provide cleaner streets was also mentioned. This confirms the findings of the site visit which identified some areas of the centre required improvements.

In-Centre Survey

- 11.35 In addition to the household survey, approximately 87 face-to-face interviews were carried out with visitors to Weymouth. The surveys were conducted across two days, over different times and at various locations around the town centre to ensure a representative sample group. As part of this survey respondents were asked what they like about Weymouth town centre and the key responses are summarised in the table below.
- 11.36 The responses confirm the attraction of the beach, which was identified by 57% of respondents, along with the harbour (33.7%). This highlights how Weymouth's distinctive seaside character and waterfront helps to create an environment that is appealing to visitors. Respondents also referred to the pedestrianised streets as something they liked about the centre.

Table 11.6 Features respondents liked about Weymouth town centre

Response	Study Area
The beach	57.0%
The harbour	33.7%
Pedestrianised streets	16.3%
Near/convenient	14.0%
Easy walking distance	11.6%
Good public transport links	7.0%
General cleanliness of streets	5.8%
Little traffic-pedestrian conflict	4.7%
Character/atmosphere	4.7%
Quality of shops	4.7%

- 11.37 Respondents were also asked how the centre could be improved and the results are set out in the table below.

Table 11.7: Features respondents thought could be improved in Weymouth town centre

Response	Study Area
None mentioned	22.1%
Don't know	19.8%
Cheaper parking	10.5%
Needs revamping	9.3%
Remove litter more often	9.3%
Better range of shops	5.8%
More choice of restaurants/cafes	4.7%
More priority of pedestrians/pedestrianisation	4.7%
Improve appearance/environment of centre	4.7%
Fill the empty shops	3.5%

- 11.38 The main improvements identified included cheaper parking tariffs, a 'revamp' of the public realm, the removal of litter and general enhancements to the town centre's appearance. The pedestrianisation of streets and increased priority for pedestrians was also raised. These findings reinforce some of the key issues and actions identified by the wider health check assessment, stakeholder engagement and site visits.

- 11.39 The survey also identified the centre's role as a destination for day and overnight visitors. For example 19.8% of respondents stated they were in the centre as a staying visitor (i.e. on holiday) and 11.6% stated that they were visiting the centre for the day.

Environmental Quality

- 11.40 Most of Weymouth town centre is included within a conservation area and there are around 177 listed buildings. Despite this, the environmental quality of the centre varies. The main character areas identified include the following:

- The **New Bond Street** area of the PSA contrasts with nearby St Thomas Street and St Mary Street. New Bond Street comprises relatively modern building designs and appears to be well maintained with little evidence of litter or vandalism. The shops here front onto an open space, although this space is not well utilised; in our view public seating and planting would enhance this space to make it more of a community meeting point and more attractive location for events. The location of the White Hart Tavern also prevents this space being used as efficiently as it could be however we consider that the tavern could be used as an asset around which events could be centres such as live music.
- Along **St Thomas Street** and **St Mary Street** there are a range of architectural styles which although interesting, are rather poorly maintained and require refurbishment. Despite this, many of the units along the two/three streets are listed. All three of these streets are pedestrianised which does help to enhance the environmental quality and the setting of the PSA. The Council's March 2017 Town Centre Inspection identified that all three of the main town centre streets require refurbishments to improve the appearance of the streetscape.
- The **Great George Street/Westham Road** area is in need of public realm improvements to enhance the existing streetscape, particularly considering its close proximity to the seafront. The area lacks any real identity and the area could benefit from improved shop frontages.
- Although defined as a secondary frontage **The Esplanade** runs along the seafront and is an important street. It comprises mainly historic and attractive buildings, many of which are listed and of 18th and 19th century architecture. The Weymouth Town Centre Conservation Area Appraisal (2012) states that the Esplanade sub-area has "168 listed buildings out of a total of 177, including 24 Grade II* designations". The promenade running directly by the seafront is wide allowing for high volumes of pedestrian movement. Planting and palm trees are located along the length of the promenade. Overall this area is of a good environmental quality, helping to create an appealing and attractive setting for both tourists and local visitor. However due to the importance of this site in connecting the town centre to the sea, The Esplanade could benefit from improvements. The Weymouth Public Realm Strategy: Draft Report (2016) identifies the key issue as being the widening of the road at the southern end of The Esplanade; this ultimately separates the active sea front from the frontage of the buildings therefore the activity to the front of the buildings is weaker than along the beach.
- In contrast to the above, **The Peninsula** situated to the southeast of The Esplanade is of a relatively poor environmental quality. The site comprises a number of disused and vacant buildings as well as a large area of concrete hardstanding used for parking. The area lacks any real identity and does not utilise its setting by the waterfront. The Weymouth Public Realm Strategy: Draft Report (2016) identifies the need for public space on The Peninsula to allow visitors and residents to enjoy the space. It also identifies the provision of a high quality pedestrian connection from The Peninsula to and along Custom House Quay to the Town Bridge as a key issue that needs to be addressed. The Local Plan states that a comprehensive approach to development is required here. Policy WEY6 sets out the ambitions for this site.
- Although the buildings along **Custom House Quay** are well presented, general public realm improvements overlooking the harbour would benefit the street's setting. For example additional planting and improved road surfaces would enhance the pedestrian environment. The Weymouth Public Realm Strategy: Draft Report (2016) recommends that Custom House Quay should mirror the qualities of Trinity Road and Cove Row; it does not currently feel like a quality waterfront.

- The **Trinity Road** area is characterised by the historic harbour. This area is of the highest environmental quality. The buildings here are painted in a variety of colours which against the backdrop of the harbour helps to create a picturesque waterfront setting. The area would also benefit from additional seating and planting as there is not currently an area for visitors to meet or sit. Subject to traffic re-routing and road capacity, we consider that pedestrianisation of the street would also help to enhance this key area, as currently vehicle movement conflicts with pedestrians.

- 11.41 Weymouth town centre is in Flood Zone 2 and 3; there are plans to improve the existing sea defences. Approximately 40% of CIL payments contribute towards flood defences. The extent of flood risk is expected to grow significantly over the next 100 years.
- 11.42 Overall, the town centre has a relatively pleasant and attractive environmental quality. However it is noted that the streets located around the harbour and seafront are better maintained than those within the core shopping area.

Accessibility, Dwell Times and Frequency of Visit

- 11.43 Weymouth is easily accessible by car with good linkages to road networks including the A354 to Portland in the south and Dorchester in the north.
- 11.44 The town centre is served by a railway station situated to the north of the town centre. South Western Railway currently provide a twice-hourly service to London Waterloo and Great Western Rail operate regular services throughout the day to Bristol Temple Meads. South Western Railway recently consulted on timetable changes proposing a reduced direct service to London with one train every hour. However, changing in Southampton would effectively facilitate a half hourly service to London.
- 11.45 Regular bus services operate from the surrounding settlements and wider afield to and from Weymouth town centre. Bus services run to centres including Portland, Lyme Regis, Axminster, Wareham, Poole, Dorchester, Exeter, Bridport as well as to surrounding visitor destinations such as Lulworth Cove/Durdle Dore and Monkey World. In line with the Weymouth Transport, Parking and Public Realm Study 2017 we recommend that a new bus station should be developed.
- 11.46 Pedestrian links across the town are generally good. The PSA benefits from pedestrianised streets and these help to create a safe shopping environment. However due to on-street parking, the streets located either side of the harbour are relatively narrow and unsafe in our view, with little space for pedestrians and cars. Access for pedestrians needs to be improved in these areas. Improvements to road and path surfacing would also be beneficial.
- 11.47 Signage and wayfinding across the town centre needs to be updated, particularly from the railway station to the town centre. The Weymouth Public Realm Strategy: Draft Report (2016) sets out a need to improve an enhanced pedestrian environment on the station frontage as well as improving signage from Weymouth station to the beach, town centre, inner harbour and the rest of the centre.
- 11.48 Unique to Weymouth, seasonal boat services operate from the harbour to Portland and Lulworth Cove. From May 2017 passing cruise ships have begun to dock in Portland Port. This could help to generate further expansion of Weymouth's tourism market.
- 11.49 During our site visit we noted that the highest footfall was around the PSA -New Bond Street, St Thomas Street and St Mary Street - whereas the secondary shopping streets had much weaker pedestrian flows.

- 11.50 There are many Council-owned car parks across the town centre, a number of these are concentrated along Commercial Road, close to the marina.
- 11.51 The main car parks across the centre include:
- Harbourside (86 spaces);
 - Cosen's Quay (40 spaces);
 - Swannery Lane (894 spaces);
 - Park Street (130 spaces);
 - Pavilion (223); and
 - Britannia multi-storey (469 spaces).
- 11.52 A park and ride service also operates from Mount Pleasant/Veasta Roundabout to the town centre however this is a seasonal service.
- 11.53 The in-centre survey results show that some 47.6% of respondents travelled to the centre via car either as a passenger or driver on the day they were interviewed, and approximately 23.3% travelled by bus and on foot. The proportion of respondents travelling to the centre on foot is lower in Weymouth than in Dorchester which suggested that more people travelled from outside of Weymouth to visit the town centre. This assumption is supported by the proportion of respondents that stated that they intended to stay in Weymouth for over 4 hours (23.3%) and on multiple night stays (8.1%). In contrast to dwell times in Dorchester, fewer respondents intended to stay in the town for between 1-2 hours (27.9%, compared to 40.2% for Dorchester). Respondents were also asked how often they visit the centre and the majority stated they visit less than once a quarter (26.7%) whereas in Dorchester, the majority of respondents visited 2-3 times a week. Again, this demonstrates Weymouth's important role and attraction as a tourist/visitor destination.
- 11.54 The survey also asked respondents who had driven to the centre how easy they found a parking space on the day of their visit. Based on a scale of 1 to 10, where 1 is very easy and 10 is very difficult, the majority of respondents (58.5%) found it very easy (1). When asked about the price of parking, the majority of respondents (26.8%) stated they thought it was 'about right', 17.1% thought it was very low, 12.2% thought it was expensive and 17.1% did not know.
- 11.55 Finally, the *Weymouth Town Centre Masterplan* sets out the intention to develop Council-owned car parks and other sites for mixed use development, including residential and leisure uses. Against this background the *Weymouth Transport, Parking and Public Realm Study* identified that there is an excess capacity of parking spaces throughout the year, although during the summer months demand and occupancy levels do increase significantly. However, the town's total capacity is never reached. Although this does suggest that there is potential to redevelop some of the town's car parks, it is essential that the needs of the centre's catchment population and tourist/visitor market continues to be met.

Out of Centre Provision

- 11.56 Jubilee Retail Park is situated close to the railway station and Swannery car park, just outside of the town centre boundary. This is the only retail park in Weymouth and comprises approximately 5,574 sqm (60,000 sq ft) of retail warehouse space. The main occupiers include Currys, Pets at Home, McDonalds, KFC, Carpet Right, Kwik-fit, Halfords, B&Q, Sports Direct, Aldi and Matalan.

11.57 As stated above the majority of the town's food store provision is situated outside of the town centre. This includes:

- Asda on Newstead Road (4,839 sqm net);
- Morrisons (3,252 sqm net);
- Sainsbury's on Mercery Road (7,170 sqm gross/ 3,905 sqm net);
- Lidl on Dorchester Road (1,799 sqm gross); and
- Aldi on Jubilee Sidings (650 sqm net).

New Investment & Potential Development

11.58 The Weymouth Town Centre Masterplan and Local Plan identifies five sites for redevelopment.

- **Commercial Road** is located to the west of the PSA and overlooks the inner harbour/marina, and is allocated for future development. The area provides a key opportunity to improve the existing frontage along Commercial Road, which is uninviting and does not utilise the waterfront, creating an enhanced approach to the town centre. Aims for the site also include: the creation of a new harbour circuit pedestrian walk; mixed use development focussed on restaurant and café uses on ground floor with residential uses above and; provision of a new public space at Westham Bridge. Large parts of the site are currently in Council ownership although there are a number of other landowners involved. The site contains a number of public car parks including Melcombe Regis (245 spaces), Harbourside (86 spaces), Britannia Multi-storey (469 spaces) and Park Street (130 spaces). Although redevelopment will comprise the loss of a number of car parks, the parking study demonstrates that there is an overprovision of parking spaces in the town centre. We consider this to be an important town centre site that would benefit from redevelopment.
- **The Peninsula** is a man-made structure situated to the southeast of the Esplanade. It is around 5 hectares in size and comprises a number of features associated with the ferry port, including a ferry docking area and terminal alongside the Pavilion Theatre, Jurassic Skyline viewing tower, carpark (223 spaces) and disused restaurant. The Masterplan sets out the key objectives to redevelop the site including: the improvement of the harbour facilities for visitors arriving by boat; the provision of a unique housing development; provision of public space; development of mixed use activities including cafes, restaurants and retail to help enhance the waterfront setting and; the provision of strategic flood defences. The site is in a high profile seafront location and offers is a key redevelopment opportunity to create a unique visitor destination. Policy WEY6 (Ferry Peninsula) of the Local Plan allocates the site for redevelopment, to include leisure/tourist uses. The latest suggestions for the site comprise a leisure-led scheme, with no residential, to include two hotels alongside a series of buildings for indoor year-round leisure such as climbing or indoor surfing (although it should be noted that an application has not yet been submitted). We consider the development of visitor facilities, supported by residential development on upper levels to be appropriate for this site.
- The **Station Gateway** site is situated at the entrance to Weymouth town centre and adjoins the Commercial Road site. Current uses on the site comprise retail warehousing units, the railway station, bus depot, car parking and residential units. Pedestrian accessibility is poor with major roads and junctions dissecting the various uses from one another. The pedestrian environment and linkages around the station forecourt are particularly poor. The Masterplan sets out the key objectives for mixed use redevelopment including: the development of a new transport hub to include a new railway station; providing an interchange between train, bus, walking and cycling; new drop-off points and waiting areas, pedestrian crossings and cycle parking spaces; the provision of a business hub for start-ups; residential development; small retail units and; a new public realm strategy to provide better vehicle movement, pedestrian links to the Swannery car park and access to the Esplanade and beach. Policy WEY3 (Station Area and Swannery Car Park) sets out that Swannery Car Park will be retained as the main town centre car park, although as a main arrival point to the town centre this area should be improved to create a better first impression of the town centre, as well as developing linkages between the site and the town

centre. In summary we also consider that this represents a key redevelopment site to improve and strengthen the main gateway to the town centre.

- The **Harbourside** site includes the area along the southern edge of the centre from the North Quay council offices and along Westway Road. Existing site uses comprise a Job Centre Plus, Weymouth Magistrates Court, former gas holder site, electricity substation, church, St John Ambulance and the former Council offices. The Harbourside site is physically separated from the town centre as well as being severed from the waterfront by the A354. There are also land contamination issues alongside multiple land ownership problems. The waterside location close to the town centre, space to accommodate uses that cannot be developed within the centre and designation outside of the flood zone, makes this site a prime site for mixed uses which may include residential, hotel, commercial and small scale retail in line with Policy WEY7 (Westway Road and North Quay Area). Any development should seek to improve the setting of the waterfront by enhancing the pedestrian environment forming part of the harbour circuit pedestrian route.
- The old Fire Station site has recently been redeveloped for retirement housing by McCarthy and Stone (ref: WP/13/00300/FUL). An outline planning application was also approved in July 2016 for the redevelopment of the North Quay Council offices (ref: WP/15/00031/OUT). The permission allows for the demolition of the existing office buildings and redevelopment, with approximately 72 dwellings and approximately 216 sqm of commercial space. Although not included within the Masterplan as a development site, the area around **Custom House Quay** and the waterfront is another major site allocated for redevelopment within the Local Plan. Policy WEY4 (Custom House Quay and Brewery Waterfront) sets out that this area will retain a mix of small retail and leisure uses and the former brewery will be retained as a major tourist facility where ancillary uses will be permitted that ensure the long term maintenance and the future of the listed building. This site comprises mainly restored warehouses and town houses as well as a number of restaurants and bars. Although this area demonstrates quality public realm, there is a need to improve the pedestrian environment. We understand that the Council have considered pedestrianisation of the quayside in the past, although this has not yet come forward. An application for the redevelopment of Brewers Quay was approved in November 2016 (Ref: WP/14/01064/FUL) comprising '*alterations and conversion of existing building to provide a museum; wet weather/exhibition space and cultural experience space; 4 Class A1/A3 units; 35 Class C3 residential units and other associated works*'. Existing uses within Brewery Quay include the Weymouth Museum at ground and first floor level, an arcade of shops and café at ground and first floor level and a restaurant fronting onto Hope Square. However, as it stands, much of the building is currently vacant. In addition, a residential scheme is proposed at Brewery Reach on the Newtons Road car park to provide 18 residential units (ref: WP/16/00852/RES).

11.59 Around the Weymouth urban area a number of large residential development are proposed, including:

- A 340 residential unit scheme was approved in June 2017 (Ref: WP/17/00271/OUT) on a 16.25 hectare site currently in agricultural use. The site is situated on the northwest edge of Weymouth, between the B3159 Dorchester and the village of Nottingham.
- A hybrid planning application, that is part outline and part full application for 180 dwellings, offices and a convenience store was granted on appeal in January 2014 at Curtis Fields south of Chickerell Road (Ref: WP/12/00907/OUT); and
- A 500 unit scheme was approved in August 2016 (Ref: WP/14/00777/OUT) at Curtis Fields, Land South of Chickerell Road. This application will form phases 2 to 4 of the above scheme.

11.60 The above developments will look to Weymouth to meet its shopping, cultural, service and recreational needs.

11.61 We are also aware that an outline application for the demolition of the existing building and the erection of a 3-storey mixed use development comprising 2 retail units fronting School Street and 23 residential apartments at the rear and on the upper floors with associated access, parking and amenity space (ref: WP/15/00137/OUT) was approved in February 2016 at the Colwell Shopping Centre.

Summary

- 11.62 In summary, the health check assessment has demonstrated that overall Weymouth is a vital and viable town centre serving both the needs of its resident catchment population, as well as a wider tourist and visitor market.
- 11.63 The key strengths and weaknesses of the centre include the following:
- Weymouth has a relatively strong comparison goods provision which is above the national average and benefits from two key anchor department/variety stores, namely Debenhams and Marks and Spencer.
 - Convenience provision is below the national average. Although there is an Iceland frozen food store and M&S Food Hall, Tesco Metro is the only major food store in the town centre. The majority of food stores offering a full range of products are situated out of centre.
 - There are a good range of high street banks in the town centre.
 - Leisure service provision is strong with a range of cafes, restaurants, public houses and a cinema, alongside attractions aimed at tourists including The Pavilion Theatre, amusement arcades and the Jurassic Skyline tower.
 - There are a number of large vacancies across the town centre including the former Council offices, Brewers Quay and the Maiden Street Methodist Church.
 - There is a good level of parking provision in the town centre which is particularly important considering the centre's role as a tourist destination. We note that this excess parking capacity could allow for the redevelopment of a number of car parking sites, as identified by the Masterplan
 - The PSA benefits from pedestrianised streets which enhances the shopping experience.
 - The general public realm of the PSA could be improved. For example, a number of streets would benefit from modernisation and the repair of a number of shopfronts.
 - Weymouth's character and appeal is defined by the waterfront setting of the town centre. The harbour area and beach, including The Esplanade, are key areas which attract visitors to the centre and are considered to be visually appealing.
 - The centre has a strong heritage; it is located within a Conservation Area and there are many listed buildings of architectural merit which generally helps to create an attractive town centre environment. The Esplanade in particular has potential to capitalise on this to help in attracting more visitors to the town centre.
 - There are a number of sites which could be redeveloped for a mix of uses to help enhance the town centre, including Commercial Road, The Peninsula, the Station Gateway and Harbourside.

12 EASTON (PORTLAND) HEALTHCHECK

Context

- 12.1 Easton is a town on the Isle of Portland, situated in the centre of the island. Portland is located to the south of Weymouth, separated by a single carriageway road on the causeway adjacent to Chesil Beach and The Fleet. There are a number of large employment sites on the island however there are a number of areas suffering from high levels of deprivation. Being located at the heart of the Jurassic Coast World Heritage Site, much of the island is encompassed by national and international environmental designations. Portland Bill is situated at the southern tip of the island and attracts many visitors to Portland. The National Sailing Academy is based in Portland and was used as a host venue for the 2012 Olympic and Paralympic sailing events.
- 12.2 The Local Plan 2015 refers to Easton as a 'Larger Local Centre'. However the Proposal Map does not define the town centre area, the PSA, PSF and SSF. The entire town is protected by conservation area status.
- 12.3 At the heart of the centre lies a small square, "Easton Gardens", with various surrounding shops, three churches, and other amenities including pubs and community uses such as the library, and a health centre. As such, the main town centre facilities concentrate along Easton Street, Easton Square, Straits and Reforne. The centre is anchored by a Coop food store, and there is also a large Tesco food store located on Park Road but this is somewhat disconnected from the rest of the town centre facilities.

Retail Composition & Diversity of Uses

- 12.4 Table 12.1 summarises the composition of the centre's retail mix and diversity of uses. It should be noted that the composition is based on the CJ site visit December 2017. The retailers have been categorised using the GOAD categories. The area surveyed by CJ covers the Town Centre Boundary, as proposed by CJ in the final recommendations (section 21).

Table 12.1: Current Retail and Service Offer- Outlets

Category	Number of Outlets	% of Total Outlets	UK (%)
Comparison	16	31.4%	31.1%
Convenience	5	9.8%	8.8%
Retail Service	11	21.6%	14.4%
Leisure Service	10	19.6%	23.9%
Financial & Business Service	5	9.8%	10.3%
Vacant Retail & Service Outlets	4	7.8%	11.2%
TOTAL:	51	100%	100%

Source: CJ site visit (December 2017)

Convenience

- 12.5 There are five convenience units which represents 10% of total outlets. This is above the national average of 8.8%. The main stores are Tesco, Coop, Martin's Off licence, Naturally Sweet (sweet shop) and Ian Burdens butchers. Given the character, role and function of the centre it is surprising that there are no independent greengrocers and bakeries, however we consider that establishing a foothold in the centre may be difficult due to the competition from Tesco.

Comparison Offer

- 12.6 There are 17 comparison outlets in the centre. This represents 32% of total units and is above the national average of 31.1%. There is a pharmacy (Boots); four charity shops; a florist; four gift shops; three specialist stores selling wool, carpets, and hardware; a pet shop; an electronic cigarette store; and a store selling hand bags. The majority of the comparison retailers are independent. However, the quality of the offer is rather basic, and there is scope to improve the overall mix and variety of retailers. It is also noted that the Tesco store has a wide range of comparison goods.

Service Offer

- 12.7 There are 26 service businesses in Easton based on the CJ audit. This represents 51% of total units and is above the national average of 48.6%. The following provides a brief summary of provision in the different service categories:
- In terms of **retail services** there are 11 units, which is equivalent to 21.6% of total units and is above the national average of 14.4%. The main provision in this category consists of 8 hairdressers/barbers and beauty salons; there is also a tattoo parlour, a vet, a post office in Martin's, and a key cutter/ engravers retailer. Most notably there are no dry cleaners, opticians or travel agents.
 - There are five **financial services**, which is equivalent to 9.8% of total outlets. This is below the national average of 10.3%. The main services in this category include a solicitors two estate agents, and bar supplies business and a building society (Yorkshire Building Society). It is noted that the town's only bank (Lloyds) closed in July 2017.
 - There are 10 **leisure services**. This represents 19.6% of the total units, which is below the national average of 23.9%. This category includes four cafés, four takeaways, an Indian restaurant and two pubs. Overall, it is considered that there is scope to introduce more restaurants into the centre, and hotels/B&B accommodations. It is also considered that the existing the café offer could also benefit from qualitative improvements.
- 12.8 Overall, the provision and mix of service businesses in the centre is considered to be adequate in meeting the day-to-day needs of its local catchment population. However there is scope for improvements.

Vacancies

- 12.9 On the day of our site visit we recorded four vacant units. This is equivalent to a vacancy level of 7.8%, and is significantly below the national average of 11.2%. We consider this a healthy position. However, it was difficult to audit the vacancies within the Easton Centre due to its confusing layout, and hence the total figure could be higher. Overall the Easton Centre appears to be under occupied.

Markets

- 12.10 No markets or community events currently operate in Easton. Given that the Easton Gardens offer a perfect place for hosting such events within the town centre, we consider that there is scope for community events to take place. It is considered that seeking to introduce such events could be highly beneficial in raising the profile of the town, increasing footfall and contributing to its overall vitality.

Retailer Demand and Prime Zone A Rents

- 12.11 No market information was available for retailer demand and Prime Zone A Rents in Easton at the time of preparing this study.

Multiple and Independent Retail Representation

- 12.12 The centre's offer mainly comprises independent businesses, which is to be expected for a centre of its size and role. The multiple offer primarily consists of the Coop and Tesco food stores, Boots Pharmacy, Yorkshire Building Society, and three charity shops (The Salvation Army, Weldmar Hospice Trust, Save the Children). It is considered that maintaining and building on the independent offer, improving the quality of provision and building its niche market will be key for Easton to succeed as a shopping, service and leisure destination.

Environmental Quality

- 12.13 Easton has a relatively pleasant and attractive environment, with a reasonable legibility. The centre is designated as a conservation area. The centre has a number of attractive buildings with a variety of architectural styles. Generally, the majority of fascias/frontages are well maintained and contribute to the quality of the environment. The centre benefits from relatively well maintained street paving, and there are only a few signs of graffiti and litter. It is considered that the centre should built on its character, encouraging a quaint appearance: street decoration (e.g. flower baskets, festive decorations), better street furniture/ public realm, and well-ordered shops signs would be of great benefit.
- 12.14 In our judgement the on-street parking does detract from the overall appearance of the centre, creating a crowded effect. Better parking facilities would therefore help to improve this situation.
- 12.15 The under-used Easton Centre should be a priority for regeneration. Its semi-vacant, "tired" appearance significantly detracts from the character of the centre.

Accessibility

- 12.16 Easton is a compact centre which is easy to navigate through, albeit the pavements are very narrow.
- 12.17 The centre also benefits from a number of bus services that connect to the rest of the island, and the mainland. However, we understand that the car is the main choice of transport.
- 12.18 There are two main car parks serving the centre. These include the car park serving the Tesco food store, and a public car park behind the health centre. It is noted however that the centre does not have adequate signage to direct drivers to these, and the street parking throughout the centre is often full. This, together with traffic congestion, significantly detracts from the quality of the environment, and discourages visitors.
- 12.19 On the day of our visit there was moderate footfall within the centre, with the highest number of people concentrated at the food stores. It is noted however that the relationship/connectivity between the Tesco store and the rest of the centre could be improved.
- 12.20 It is also noted that whilst Easton Square is an attractive feature, its layout and the general connection to surrounding street does not encourage its use.

Summary

- 12.21 In summary, we consider the vitality and viability of Easton Local Centre is adequate, but there is scope for improvement. The key findings are summarised below:
- Easton performs adequately as a local centre, principally meeting the needs of its immediate population.

- There is a good convenience offer, with the key anchor retailers being Tesco Superstore and Coop. However, the physical relationship and linkages between the Tesco store and the rest of the centre could be improved.
- The quality of the comparison offer is rather basic, and there is scope to improve the overall mix and variety of retailers.
- There is scope to introduce more restaurants into the centre, and hotels/B&B accommodation. It is also considered that the existing café offer could also benefit from qualitative improvements.
- The retail mix is largely dominated by independent retailers. We advise that Easton should build on its independent offer, improving the quality of provision and building its niche retail offer.
- The centre should seek to establish a market, and host community events. This would raise the profile of the centre, and encourage visitors.
- The vacancy levels appear to be low, but the under-used Easton Centre should be a priority for regeneration.
- Easton has a relatively pleasant environment, and should build on its character, encouraging a quaint appearance.
- There is a need to improve parking provision.

13 DORCHESTER HEALTH CHECK

Context

- 13.1 Dorchester is a historic County Town with a strong Roman and pre-Roman heritage. It is West Dorset district's largest centre and fulfils an important role in the network and hierarchy of centres serving the needs of its catchment population, and also a wider visitor/tourist market. The town centre is located almost entirely within a conservation area and contains a large number of listed buildings.
- 13.2 Javelin Venuescore ranks the centre as 217th of the UK's retail venues in 2016/17. This ranking is above Weymouth, which is placed 232nd.
- 13.3 The 2015 Local Plan sets out that by 2031 Dorchester will be a quality county town with a significant offer of retail, health, cultural, leisure and community facilities; have an attractive and vibrant sub-regional town centre that people come to enjoy, away from motor traffic; and have a high standard of design that promotes the character and heritage that is special to Dorchester.
- 13.4 The town centre boundary, as defined on the Local Plan Policies Map, forms a 'T' shape. The boundary covers a relatively wide area extending from the Brewery Square development and Fairfield Road market and car park site along Weymouth Avenue to High West Street/High East Street in the north, encompassing Trinity Street and South Street/Cornhill. To the northwest the boundary extends to the corner of Albert Road/Prince's Street and north to High Street. To the northeast the boundary extends to the Salisbury Street/High Street junction.
- 13.5 The adopted Policies Map defines a PSA which covers the units situated either side of South Street/Cornhill, including the Tudor Arcade and the Forum Centre on Trinity Street. The primary and secondary frontages are defined as follows:
- Primary Shopping Frontage: comprises the length of South Street/Cornhill, including the units within the Tudor Arcade; and
 - Secondary Shopping Frontage: covers the length of Trinity Street, New Street, the Forum Centre (including the Co-op store), Antelope Walk, High West Street/High East Street and Hardye Arcade.

Retail Composition & Diversity of Uses

- 13.6 Tables 13.1 and 13.2 below set out the centre's retail and service mix, and diversity of uses based on the total outlets and floorspace recorded by the latest Experian Goad Category Report.

Table 13.1: Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	124	40.3%	31.1%	129
Convenience	22	7.1%	8.8%	82
Retail Service	43	14.0%	14.4%	97
Leisure Service	59	19.2%	23.9%	80
Financial & Business Service	34	11.0%	10.3%	107
Vacant Retail & Service Outlets	26	8.4%	11.2%	75
TOTAL:	308	100.0%	100%	570

Source: Experian Goad Category Report (April, 2017)

Table 13.2: Current Retail and Service Offer – Floorspace

Category	Floorspace (sqm)	% of Total Outlets	UK (%)	Index
Comparison	21,405	38.2%	35.0%	109
Convenience	5,658	10.1%	15.2%	67
Retail Service	5,073	9.1%	6.8%	133
Leisure Services	10,953	19.6%	25.0%	78
Financial & Business Service	6,615	11.8%	7.7%	153
Vacant Retail & Service Outlets	6,299	11.3%	9.7%	116
TOTAL:	56,003	100.0%	100%	656

Source: Experian Goad Category Report (April, 2017)

Notes: The floorspace figures are derived from the relevant Goad Plan (see Section 5). Figures may not sum due to rounding.

Convenience Offer

- 13.7 There were 22 convenience units in the town centre in 2017 and a total (Goad) convenience floorspace of 5,658 sqm (60,200 sq ft). This represents 7.1% of total outlets and 10.1% of all floorspace, and is below the national averages of 8.8% and 15.2% respectively.
- 13.8 The main convenience stores serving the town centre include Waitrose, situated within the Tudor Arcade and Co-op, located off Trinity Street and forming part of The Forum Centre. On the day of the site visits both stores, particularly Waitrose, appeared to be popular and busy, and both have their own car parks. Marks and Spencer on South Street also has a food hall.
- 13.9 These two main food store anchors are supported by a range of other convenience stores in the town centre including: bakers/confectioners (4 outlets); a butcher; CTN stores (2); a frozen food store (Iceland); grocers/delicatessens (4); health food stores (including Holland & Barrett) (4); an off license; and shoe repair outlets (2). There are no fishmongers or greengrocers in the town centre; however there are stalls selling these types of goods at Cornhill market.
- 13.10 The main out-of-centre provision is the Tesco superstore situated on Weymouth Avenue, approximately one mile to the south of the town centre; and Lidl to the north, off The Grove/Westleaze. There is also a small Sainsbury's Local convenience store to the north-west of the town centre, on Bridport Road.
- 13.11 The in-centre survey results identified that 14.9% of respondents were visiting the centre for food shopping on the day of their interview, which is a smaller proportion of respondents who were in the centre for non-food shopping (36.8%). Of this 14.9%, 46.2% intended to visit Waitrose; 15.4% intended to visit Marks and Spencer; and 7.7% intended to visit Iceland. Surprisingly no respondents stated that they were visiting the Co-op store.
- 13.12 The majority of visitors who were in the centre to buy food goods, also intended to link their shopping trip with a visit to other shops or services. For example, 15.4% intended to visit another food shop; 38.5% intended to visit non-food shops; and 46.2% intended to visit a café or restaurant. This underlines the importance of the town's food stores in generating linked trips, footfall and spin-off expenditure to other shops, businesses and services across the town centre.

- 13.13 The market share analysis also identified that Dorchester town centre captures 9.4% of expenditure from just the West Dorset district area. By contrast, the Dorchester out of centre food stores (primarily Lidl and Tesco, but excluding the Waitrose store at Poundbury) capture a market share of 16.0%. We consider this to be a relatively low level of convenience goods market share, and suggests that either the existing stores are not performing as well as expected and/or there is scope for an additional store not currently represented in the town.
- 13.14 Whilst we accept that Dorchester does have a reasonable choice of food and convenience stores, there are some national retailers that are not represented and overall the centre achieves a relatively low market share. For example, whilst Sainsbury's has representation within the town, this is in the format of a smaller local convenience store. It is possible that a retailer such as Sainsbury's, Asda or Morrisons, which have stores in Weymouth, may have a requirement for a larger store in Dorchester town centre. There is also the potential in our view to improve the town's independent provision, such as the potential for a greengrocer and fishmonger.

Comparison Offer

- 13.15 There are 124 comparison goods retailers in Dorchester town centre (as defined by Experian Goad), trading from a total comparison goods floorspace of approximately 21,405 sqm. This represents 40.3% of total units and 38.2% of all floorspace, which is significantly above the respective national averages of 31.1% and 35.0%. However, it should be noted that comparison goods retailing accounted for a higher proportion (49.0%) of all shops according to the *2008 Retail Study*.
- 13.16 There is a wide variety of different goods sold by multiple and independent retailers across the town centre including: antiques, art, books, charity shops, chemists/pharmacies, clothing, crafts/gifts, cycles/accessories, DIY, electricals, footwear, furniture, hardware/household goods, jewellery, music, newsagents/stationers, sports/camping/leisure, mobile phones, toiletries/cosmetics, textiles/soft furnishings and toys. There is a particularly good representation in the following non-food retail categories:
- The 11 '**general**' clothing stores represent 3.57% of all outlets, which is above the national average of 1.67%. Some of the main clothing retailers include Next, Fat Face, Crew Clothing and Marks and Spencer.
 - There are 8 '**ladies and menswear/accessory**' shops which represents 2.60% of total outlets; this is above the national average of 1.63%.
 - There are also some 7 '**ladies wear and accessory**' shops which represents 2.27% of total outlets compared to the national average of 2.06%; and
 - The 11 '**jewellery stores**' represent 3.57% of total outlets recorded in the town centre, which is more than the national average of 1.62%. The main multiple jewellers includes H Samuel.
- 13.17 We consider the good provision of clothing and fashion retailers to be a positive feature which reflects on the health of the town centre.
- 13.18 Notwithstanding this, charity shops represent 4.55% of total units which is above the national average of 2.71%. Whilst these shops serve an important role within a town centre, an overprovision of these stores could be considered to be an indicator of a declining town centre. Therefore we advise that any further increase in this store type should be closely monitored.
- 13.19 The main town centre anchors comprise Marks and Spencer and Goulds independent department store. There are also a range of both high street and independent retailers including Argos, White Stuff, Next, Robert Dyas and WHSmith. There is also a weekly market which sells a range of food and non-food goods.

- 13.20 The majority of comparison retail in the town centre is located on Trinity Street and South Street. There are some retail units at the Brewery Square development (although it should be noted that the Goad survey boundary does not extend to include these units). The retailers at Brewery Square consist of a number of mid to higher end high street operators such as Hobbs, Phase Eight and Joules that were not previously represented in the town centre. These quality retailers which fulfil a gap that is missing from the town centre's more mid-range offer. However their location away from the main town centre, and the main role of Brewery Square as an evening leisure destination, means that these stores are not performing as well as originally expected. In response, there may be potential to extend the opening times of these stores and this could potentially increase the number of trips and footfall linked to the other main leisure uses.
- 13.21 The in-centre survey results show that 36.8% of respondents were in the centre at the time of their interview to buy non-food goods, which is more than double the proportion of visitors who were food shopping. Of these, the main shops visited were:
- Poundland (18.8%);
 - Goulds, Argos and New Look (12.5% respectively);
 - Marks and Spencer (9.4%); and
 - Next (6.3%).
- 13.22 Overall, we consider that Dorchester has a relatively good comparison retail offer for a town of this size. A wide range of goods are sold across the centre catering to the needs of the local population and visitors to the town centre. Despite this, the market share analysis revealed that from the West Dorset district area only, Dorchester town centre retains approximately 19.4% of expenditure. This represents a relatively low market share and expenditure retention which is reflective of the level of competition from other centres- notably Bournemouth, Poole and Yeovil.
- 13.23 Although Dorchester may not be able to compete with the surrounding larger centres, the general number and quality of the shops are considered relatively appropriate for a centre of this size. However, we do acknowledge that the centre will undoubtedly face challenges going forward. These challenges may include the continued strategy of key retailers, such as Marks and Spencer and Next, to review their store portfolios driven by the preference for fewer but larger stores, making Dorchester vulnerable to possible closure or relocation.

Service Offer

- 13.24 There are 136 service outlets in the town centre area defined by Experian Goad. They account for 44.2% of all units, which is below the national average of 48.6%. Notwithstanding this, current provision is slightly higher than the 43% recorded by the 2008 study.
- 13.25 The following provides a brief summary of provision across the three main service categories:
- There are 43 **retail services**. This represents 14.0% of total outlets, which is just below the national average of 14.4%. Retail service provision comprises of predominately health and beauty outlets (23 units) which account for 7.5% of total units in the town centre compared with the national average of 8.9%. Additional retail service provision comprises 1 dry cleaners/laundrettes, 9 opticians, a photo studio, a post office, 4 travel agents, 2 vehicle repair shops and a clothing and fancy dress hire shop. Although retail service provision is below the national average we consider that the centre is relatively well served.
 - There are 34 **financial services** in the town centre. This represents 11.0% of total units, which is above the national average of 10.3%. Financial services include 4 employment/career services, 3 financial

services, 15 estate agents and 8 retail banks (including Barclays, Natwest, HSBC, Halifax and Santander). Overall there is a good representation of financial services in Dorchester town centre.

- There are 34 **leisure service** outlets recorded by Experian Goad in the defined town centre. This is equivalent to 19.2% of total units, which is below the national average of 23.9%. Leisure provision includes bingo/amusements, 17 cafés, 3 casinos/betting offices a nightclub, 13 takeaways, 5 hotels/guesthouses, 5 public houses and 13 restaurants. The independent Plaza cinema on Trinity Street is very popular with local residents and offers cheap ticket prices of £2.50 - £3.50.

13.26 The area covered by Experian Goad does not extend to Brewery Square where the main operators include a 3-screen Odeon cinema and a number of restaurants/cafes including: Nando's, Carluccios, Wagamamas, Pizza Express, Costa Coffee, Creams and Zizzi. The town centre's leisure offer and draw has expanded significantly since the development opened in 2013. Due to the strong evening economy around Brewery Square, there is little night time activity within the town centre. We understand that due to Brewery Square's proximity to the rail station, visitors from surrounding centres travel in via train during the evenings to use the leisure facilities here. Brewery Square also hosts a Premier Inn and gym. The grade II listed Victorian Brewhouse is proposed to be converted to create a 52 bed, four star hotel and spa overlooking Brewery Square. Aside from the Premier Inn, there are no other hotels of scale within the town centre. The Central Square is used to host events and outdoor screenings. In addition, there is to be an Arts Centre within the maltings building associated with the former Brewery incorporating a theatre, studio space, meeting rooms and a café/bar.

13.27 Overall, we consider that central Dorchester could benefit from additional leisure provision, but this will inevitably be subject to market demand. Whilst Brewery Square has significantly strengthened the town's overall leisure offer, it has displaced leisure visitors from the town centre, particularly during the evenings. Attracting more bars and restaurants, particularly independents to complement the operators located at Brewery Square would help to enhance the evening and night time economy and activity within the town centre during these times.

13.28 Dorchester also has a number of museums including:

- the Dinosaur Museum;
- Dorset County Museum;
- The Keep;
- Dorset Teddy Bear Museum;
- the Tutankhamun Exhibition; and
- Terracotta Warrior Museum.

13.29 The museums help to underpin Dorchester's role as a historic and cultural centre. We understand that a number of the museums are popular including Dorset County Museum, which will be hosting the Natural History Museum's famous 'Dippy' dinosaur in early 2018. This will be the final exhibition to take place before the museum closes, due to be reopened in 2020, for a £15 million extension. In June 2014, planning permission was granted to redevelop the Shire Hall into a major heritage attraction and centre of learning. The attraction is expected to open in March 2018.

13.30 Given the size and role of the centre, we consider that the overall representation of services, museums and theatres is generally good. Notwithstanding this, the challenge for the local planning authority over the plan period will be to promote and attract new leisure-based investment in the heart of the town centre now that the Brewery Square is firmly established as a popular leisure destination.

Vacancies

- 13.31 There were 26 vacant units recorded by Goad in 2017. This is equivalent to an 8.4% vacancy level and is significantly below the national average of 11.2%. This low vacancy rate indicates a healthy town centre which is performing well.
- 13.32 During our site visit we identified a concentration of vacancies towards the southern end of South Street. We consider that recent public realm improvements that have taken place here may help make the area more attractive to potential occupants. There were also two vacant units within Nappers Court, including Napper's Mite restaurant/café which has external garden space which is now overgrown and untidy. Given that Nappers Court links South Street to Charles Street, where one of the main visitor car parks is located, it is important that this green space is better maintained. There are also a number of small vacant units along Trinity Street including the former amusement arcade, Gondola Italian restaurant and one unit within the Forum Centre.
- 13.33 Other larger vacant units include the Old Post Office situated on the corner of South Street/New Street. This is a Grade II listed building which sits on a prominent corner position within the town centre.

Multiple and Independent Retail Representation

- 13.34 The 2017 Goad Category report identified that there are 101 multiple retailers in the surveyed area. Some of the main national operators include Boots, Marks and Spencer, Argos, Waitrose, New Look, Next, Carphone Warehouse, Clarkes, Clintons, Vodafone, Waterstones, Card Factory, Co-op, Edinburgh Woollen Mill, Peacocks, Fat Face, WH Smith, Blacks, Crew Clothing, Holland and Barrett and Monsoon. Outside of the defined Goad boundary, there are a number of mid-range high street brands occupying the units around Brewery Square including Hobbs, Phase Eight and Joules. Marks and Spencer is the centre's main retail anchor and it is supported by good provision of other multiple operators.
- 13.35 Dorchester also has a good provision of high quality independent retailers. These stores are located predominately within the small shopping parades across the centre, such as Antelope Walk and Trinity Street. The main independent retailers include Gould's department store and Woods home furnishing store. Gould's sells mainly household goods and clothing and also has in-store café's. Woods are located on High East Street and at Brewery Square, stocking a range of furniture and home furnishings. Dorchester's independent retailers are an important feature of the town centre's offer and appeal to visitors, as they help to underpin the centre's unique character and diverse offer.
- 13.36 Overall we consider that there is a relatively good mix of both independent and multiple retailers in the town centre. The important independent retail offer should be maintained and enhanced, alongside attracting additional multiple anchor stores to help underpin the town's overall vitality and viability. However, we understand at present that there is a lack of suitable unit types and sizes to accommodate large retail formats; this is namely due to the constraints posed by the historic fabric of the town centre.

Markets

- 13.37 Dorchester Market operates every Wednesday and Sunday between 6.30am and 2pm. The market is situated on Fairfield Car Park opposite Brewery Square. This is used as a car park during non-market days. The site comprises Duke's fine art sales room and a café. There is also a daily market held at Cornhill which is to the north of South Street in the centre of Dorchester.

- 13.38 The traditional market day in Dorchester takes place on Wednesdays on Dorchester's former cattle market. The market sells mainly household goods, plants, bric-a-brac, fruit, vegetables and meat. A car boot sale is also held on the site every Sunday. There is no weekend market on the Fairfield site.
- 13.39 Although the market is considered to be a key part of Dorchester's heritage, it is viewed as being a visually unattractive site. This is further reinforced by its proximity to the modern Brewery Square development located adjacent to the site.
- 13.40 The market is also situated somewhat outside of the main retail area. Although some linked trips do occur between the market and PSA, the more peripheral location of the market does little to maximise the linkages between the two distinct shopping areas. We understand that the loss of parking during market days also poses issues. In summary there are concerns regarding the health of the market. It is clearly in need of a 'refresh' in terms of its appearance and the variety of stalls. Further to this its location and days of operation limit its success. Against this background we advise that opportunities should be explored to relocate the market to a site closer to the heart of the town centre so that it has more of a positive impact on the centre's overall vitality and viability through linked trips and expenditure. The market would also benefit from more proactive management and curation of its stalls and offer.
- 13.41 Cornhill Market operates on South Street, six days a week and also hosts stalls selling a range of products. A farmers market also takes place on South Street on the last Saturday of every month.

Retailer Demand & Requirements

- 13.42 The latest *Requirement List* (June 2017) indicates that there is published requirements from 25 retail, leisure and service operators for representation in the town; equivalent to a total minimum floorspace of 9,509 sqm (102,350 sq ft) gross. These include a range of operators across different sectors, including:
- **Supermarkets** - Lidl, Aldi and Farmfoods;
 - **Leisure** - Snap Fitness, Marstons, KFC and Taco Bell;
 - **Hotel operators** - Travelodge;
 - **Comparison retailers** - Bonmarche, Savers, Poundworld, Jigsaw, Warren James, Matalan and JoJo Mamam Bebe.

Prime Zone A Rents

- 13.43 The PROMIS Retail Report (November 2017) states that at mid-2017 estimated prime rents in Dorchester stood at around £85 psf Zone A. This represents a marginal increase on prime rents in the town recorded toward the end of 2016.

Household Survey

- 13.44 We have drawn on the findings of the household telephone interview survey (HTIS) to help gauge customers' views and perceptions of the town centre as a place to shop and visit for a range of leisure uses and other activities.

Table 13.3: Features respondents liked about Dorchester town centre

Response	Study Area
Attractive environment/nice place	20.9%
Close to home	14.7%
Good range of independent shops	14.3%
Good range of non-food shops	13.7%
Nothing/very little	11.7%
Easy to park	11.3%
Compact	7.0%
Good range of High Street/multiple retailers	6.5%
Good pubs, cafes or restaurants	5.8%
Traditional	3.3%

13.45 The majority of respondents indicated that they liked Dorchester for its attractive environment, which confirms the findings of the health check. Other features respondents liked about Dorchester include the range of comparison goods stores, the independent stores and the range of high street stores. Additionally respondents like that the centre is traditional and compact.

13.46 Respondents were also asked what, if anything, they would improve in Dorchester that would encourage them to visit more. The table below provides a summary of the most frequently raised suggested improvements for the town centre from respondents.

Table 13.4: Key improvements for Dorchester town centre

Response	Study Area
Nothing	60.6%
Don't know	15.0%
More/better parking	6.2%
More national multiple shops/High Street shops	5.6%
More independent shops	3.6%
Free car parking	3.1%
More/better comparison retailers	2.7%
Better public transport	1.3%
Better access by road	0.9%
More/better food shops	0.6%

13.47 The majority of respondents across the study area stated 'nothing' or 'don't know' (75.6%). Those that did identify improvements highlighted the need for more/better and/or free parking and better access to the centre by public transport and by road. In terms of retail, respondents stated that there is a need for more high street stores and more/better comparison retailers.

In-Centre Survey

13.48 In addition to the household survey, some 87 face-to-face interviews were carried out with visitors to Dorchester. The surveys were conducted across two days at different times and in various locations around the town centre to ensure a representative sample group. As part of this survey respondents were asked what they like about Dorchester town centre and the key responses are summarised in the table below.

Table 13.5: Features respondents liked about Dorchester town centre

Response	Study Area
Character/atmosphere	25.3%
Near/convenient	20.7%
Selection/choice of independent/specialist shops	20.7%
Pedestrianised streets	18.4%
Selection/choice of multiple shops	17.2%
Feel safe/absence of threatening individuals/groups	13.8%
Not too crowded	11.5%
Parking is easy	10.3%
Parking is cheap	6.9%
Historic buildings/tourist attractions	5.7%

13.49 The main features respondents liked most about Dorchester are: (i) its character/atmosphere (25.3%); (ii) its convenience to where they live (20.7%); and (iii) the choice of independent stores (20.7%). Respondent's also highlighted: the importance of the pedestrianised streets; choice of high street shops; good parking availability; and the number of historic buildings/tourist attractions. Together, these factors support Dorchester's key role as a main town centre and an appealing visitor destination.

13.50 Respondents were also asked how the centre could be improved and the results are set out in the table below.

Table 13.6: Features respondents thought could be improved in Dorchester town centre

Response	Study Area
Better range of shops	21.8%
Don't know	20.7%
None mentioned	19.5%
Finish the road works	4.6%
More parking	3.4%
Remove the A boards from the footpath	3.4%
River Island	2.3%
Less traffic/congestion	2.3%
Fill the empty shops	2.3%
Better bus services to the centre	2.3%

13.51 Some 21.8% of respondents identified that a better range of shops would improve the town centre's retail provision; 2.3% of respondents specifically referred to the need for a River Island clothing store. The site visit confirmed that whilst there is potential for improvements, there is a relatively good range of comparison and convenience stores in the centre. A number of the respondents also identified the potential to improve the town's overall accessibility and movement, including issues with road works, traffic congestion, bus services and clutter on footpaths.

Environmental Quality

13.52 Dorchester benefits from its historic character which helps to create an attractive and distinctive town centre. The town centre as defined by the Council encompasses four main areas which are all of varying environmental quality:

- Despite **High West Street/ High East Street** being a busy thoroughfare with regularly congested traffic along it, the public realm is considered to be of a high quality. There are regular pedestrian crossings and well maintained pavements which enhance the restricted pedestrian environment. Historic buildings

including St Peter's Church, Dorchester Corn Exchange, Dorset County Museum and Judge Jeffreys (which is now occupied by Prezzo restaurant) also help to significantly enhance the street scene.

- **Charles Street** would benefit from improvements and/or redevelopment in our view. The Charles Street car park is one of the centre's main car parks and hence forms one of the first impressions for both new and old visitors to the town. There are few active frontages, with the street mainly comprising the rear of the units fronting onto South Street and their service yards. Therefore the street appears untidy and provides little interest to visitors arriving into this key gateway to the town centre.
- **Trinity Street** serves a secondary retail role and the public realm and environmental quality of the street reflects this. Rear building access to a number of shops on South Street can be gained from Trinity Street which is not attractive, particularly given its location next to both the Poundland and Marks and Spencer service yards. The quality of the buildings along the street also vary. Notwithstanding this, the Plaza Cinema is recognised as a building of architectural interest due to its art deco style and Antelope Walk is also considered to be of a high quality.
- The north of **South Street** and **Cornhill** is generally clean and tidy with well-maintained streets and buildings. Many of the buildings comprise high quality historic architecture. There is planting, public seating and litter bins distributed along the street that all help to enhance the pedestrianised shopping environment. At the time of the site visit there were road works taking place along the southern end of the street to help improve the previously poor public realm, which caused disruption along the street and created an unattractive environment. However, the works were completed at the end of August 2017 and involved raising the height of the road up to the same level as the pavements using materials that compliment those already in place in upper South Street. The street is now closed to traffic, other than for loading and unloading, between 9.30am and 4.30pm, helping to create a more appealing pedestrian environment. The Hardy Arcade, which provides a link from Charles Street through to South Street, is dated and could benefit from modernisation. Napper's Court which links Charles Street to the PSA was overgrown and had not been properly maintained at the time of our visit.
- **Brewery Square** is the most recent and modern development within the centre. It is an example of a high quality mixed use regeneration scheme. This area is pedestrianised with cobbled pavements, which contrasts with the surrounding modern building design. There are public benches to the front of the square (around the Odeon cinema) and to the east of the site there are rows of concrete seating surrounding a central square with multi jet fountains. The Dorchester Brewery and associated buildings, which form part of the scheme but are still under construction, are a building of architectural interest which also contrast with the surrounding modern developments. There is planting throughout the development and there is very little evidence of litter or vandalism. Overall, this area is of the highest environmental quality.

Accessibility, Dwell Times and Frequency of Visit

- 13.53 Dorchester is relatively well connected by road, rail and public transport. The A35 is situated to the south of the town centre and runs east to west around the town. The A37 provides links to Yeovil, whilst the A354 provides access to Weymouth. Travelling to the centre by car from surrounding towns and villages is relatively easy.
- 13.54 The town is served by two railway stations. Dorchester South is situated east of Weymouth Avenue in close proximity to the Brewery Square redevelopment, and is served by London to Weymouth services. Dorchester West is situated south of Damers Road, close to The Range store, and provides services to Weymouth and Bristol. Dorchester West is located to the south and west of the town centre and is only around 0.3 miles from Dorchester South. Both stations are located outside of the town's PSA and there is potential to improve accessibility, linkages and signage between the station and town centre. For example, during the site visit we identified that the route from the Dorchester South and Brewery Square to the town centre is not immediately obvious, particularly once pedestrians have walked to the northern end of Weymouth Avenue. Therefore additional signage and planting may benefit way finding here.

- 13.55 The centre is also served by a good bus network serving surrounding settlements, including Sherborne, Yeovil, Lyme Regis, Bridport, Poundbury, Weymouth, Axminster, Blandford Forum, Puddletown and Sturminster Newton. There is no bus station or central focus for public transport in the town centre, with bus stops located on Trinity Street, High East Street and High West Street. This means that different parts of the centre are relatively accessible to shoppers arriving by bus.
- 13.56 The town centre benefits from a number of pedestrianised streets which help to enhance the pedestrian experience and safety across the centre. The northern end of South Street and Cornhill is currently pedestrianised and recent works have now completed the pedestrianisation of the southern end of the road. Kerbs and steps have been lowered/removed where possible and this section of the street will be closed to traffic between 9.30am and 4.30pm. High East Street and High West Street are heavily trafficked which acts as a barrier to pedestrian movement however there is an adequate number of pedestrian crossings. At the time of our site visit the strongest pedestrian flows were recorded along Cornhill whereas the weakest pedestrian flows were along the south of Trinity Street and High East Street/High West Street. Brewery Square is also pedestrianised, which creates an appealing environment for visitors during the evenings when visitor numbers in this area are at their greatest.
- 13.57 Pedestrian movement between Weymouth Avenue and the PSA was previously hindered by the lack of crossing from Weymouth Avenue to South Street and works were taking place to resolve this during our site visit. Works have now been completed to improve the pedestrian crossings here; relocating the existing South Walks Road crossing further west (towards Prince of Wales Road) to bring it as close as possible to the pedestrian desire line between South Street and Brewery Square. This now provides a much more direct route.
- 13.58 Dorchester serves a largely rural population meaning large numbers of visitors travel to the centre by private car therefore car parking is a key element of the town centre. The centre's main car parks include:
- Fairfield Long Stay (372 spaces);
 - Fairfield Short Stay (140 spaces);
 - Lower Trinity Street (200 spaces);
 - Acland Road (255 spaces);
 - Durngate Street (50 spaces);
 - Old Market (67 spaces);
 - Wollaston Field (161 spaces);
 - Colliton Park (54 spaces);
 - Top O'Town (206 spaces); and
 - Trinity Street (120 spaces).
- 13.59 The in-centre survey results show that 56.3% of respondents travelled to the centre by car either as a driver or passenger, followed by 34.5% who travelled on foot. Only 8.0% arrived in the centre by bus. The relatively high proportion of respondents walking to Dorchester indicates that many local residents are actively visiting the town centre and using the local services.
- 13.60 Respondents were also asked how long they intended to stay in the town centre. The majority of respondents intended to stay between 1-2 hours (40.2%) or 2-3 hours (23.0%). Approximately 14.9% intended to stay in the centre for longer, over 4 hours. This is a shorter dwell time compared to Weymouth, however this is to be expected considering Weymouth's role as a tourist destination. Promoting Dorchester's 'brand' and attraction

as a visitor destination could help to increase trips, dwell times and expenditure across the town to the benefit of its daytime and evening economy.

- 13.61 The survey also identified the frequency of visits to the centre. The majority of respondents (27.6%) indicated that they visit 2-3 times a week, followed by 21.8% visiting daily, 18.4% visiting once a week and 8.0% visiting 4-6 times a week. The high proportion of regular visitors again indicates that Dorchester is popular with local residents and unlike Weymouth, does not have as many visitors/tourists.
- 13.62 In summary, accessibility for both pedestrians and vehicles across the centre is relatively good and construction is currently taking place to further improve access.

Out of Centre Provision

- 13.63 Dorchester's Weymouth Avenue Retail Park is situated on Weymouth Avenue south of Dorchester town centre. The scheme extends to 2,044 sqm (22,000 sq.ft) and comprises three warehouse units, namely Halfords, Pets at Home and Currys (including Carphone Warehouse).
- 13.64 Tesco is located adjacent to the retail park and is open 24 hours a day (excluding weekends). The Tesco also includes a petrol filling station and has an in-store pharmacy and phone shop.
- 13.65 Lidl is situated around a 5 minute walk to the north of the town centre. There is parking on site and the store provides a small range of non-food goods.

New Investment & Potential Development

- 13.66 As described above, the most recent investment in Dorchester is the Brewery Square scheme. The first phase of development opened in 2013 and it has significantly strengthened the scale and quality of the town centre's overall leisure offer. In addition to the residential apartments, the commercial element of the scheme comprises a cinema, branded operators hotel, shops, health centre and a public square. The second phase of the development is proposed to include the 4-star Dorchester Brewery Hotel and Spa, the Maltings Art Centre and Hardy Theatre. The hotel will be situated inside the restored grade II listed Victorian Brewhouse. The next phases will also see the development of further residential apartments and townhouses. Following the completion of Brewery Square there will be a total of 578 apartments and 32 town houses. The Brewery Square also benefits from its location next to Dorchester South railway station. Given its location outside the town's PSA it is important that the routes to the town centre are actively promoted and signed to help encourage greater linked trips and to ensure that the main town centre benefits from the recent and planned development. Without these linkages there is a concern that the Brewery Square scheme will significantly shift the town's leisure and retail 'gravity' and footfall away from the PSA.
- 13.67 Recent planned investment in the town centre includes the refurbishment, reconfiguration and extension of the existing Dorset County Museum, installation of new shopfront and demolition of existing buildings. This application was approved in May 2017 and will result in a net additional gross internal floorspace of 610 sqm. Work is due to be finished in 2020, until which time the museum will remain closed. Additionally, the Shire Hall Museum which includes the Old Crown Court and Cells and is famous for the trial of the Tolpuddle Martyrs, is currently under construction and is due to open in 2018. The other main sites in the heart of the town centre that could provide the opportunity for further new retail, leisure and mixed use development (subject to developer interest, market demand and planning), include the following:

- **Land off Trinity Street** – is identified by the *West Dorset, Weymouth & Portland Local Plan* (2015) as a potential main development opportunity to be brought forward during the plan period. Policy DOR5 sets out that Trinity Street will be the preferred location for future retail expansion of the PSA and that any scheme coming forward will need to retain an appropriate amount of public car parking. The Trinity Street car park is situated to the western side of Trinity Street adjacent to Co-op. The Policy DOR5 boundary includes the Iceland food store, the car park and shops along the eastern side of Trinity Street. The units along this area of the street are of a lower quality to those on South Street/Cornhill. We understand that the site is owned partly by West Dorset District Council and part private ownership, which could pose land assembly issues.
- **Charles Street Car Park** - is a Council owned site, comprising some 1.2 hectares and is the key site allocated for retail development with ancillary mixed uses in the *2015 Local Plan* (Policy DOR4). The development of this site could provide a significant boost in the retail floorspace available in the heart of the town centre, with direct links to the PSA. However it is currently an important town centre surface car park. West Dorset District Council's new offices were constructed on site as part of Phase 1, along with the library and education centre. However, retail-led proposals for the rest of the site have not yet come forward. To date three schemes have been proposed but have failed to be built out, these include:
 - An outline planning application was approved in December 2010 (Ref: 1/D/10/000763) for the '*demolition of existing buildings and structures and comprehensive redevelopment comprising retail units (Use Class A1), restaurants and cafes (Use Class A3), financial and professional services (Use Class A2), a hotel (Use Class C1), residential apartments (Use Class C3), library (Use Class D1) and adult learning centre (Use Class D1) with associated undercroft parking, new pedestrian links, public square...*'.
 - An application for the renewal of outline planning permission for Phase 2 of the Charles Street Redevelopment Scheme was approved in December 2013 (Ref: 1/D/13/001272) for the '*demolition of existing buildings and structures and comprehensive redevelopment comprising retail units (Class A1), restaurants and cafes (Class A3), financial and professional services (Class A2), a hotel (Class C1), residential apartments (Class C3) with associated undercroft parking...*'. This application was submitted following the completion of Phase 1. Phase 2 comprised five blocks one of which included a large anchor retail store.

A further outline planning application was submitted for a revised scheme for Phase 2 of the Charles Street Redevelopment Scheme in November 2016 (ref: WD/D/14/002002). However, this was later withdrawn. The changes to the Phase 2 scheme included the amalgamation of a number of retail units to accommodate Marks and Spencer, the removal of the hotel element and an increase in the residential element of the scheme equating to circa. 49 additional residential apartments. We understand that since the most recent consent developer Simons Estates have pulled out the proposed retail scheme due to viability and specifically the costs related to preserving the archaeological value of the site.

13.68 Outside the town centre's PSA (albeit defined as being edge-of-centre in retail planning terms) the main development opportunity is the **Fairfield Road Car Park** (372 spaces), which also hosts the weekly market (see above) and is owned by West Dorset District Council. The *Dorchester Town Centre Development Report* (2016) identified the site as providing the potential for a development of new commercial uses, subject to the relocation of existing uses. .

13.69 We assess the relative availability and suitability of the three town centre sites to accommodate any potential forecast need for new retail and commercial leisure uses in more detail in Section 23 of this study

Summary

13.70 In summary, the health check assessment has demonstrated that Dorchester is a vital and viable centre that has benefitted from recent new investment and development, albeit outside of the PSA. Notwithstanding this, the town centre also has some weakness and 'gaps' in its overall offer and environment.

13.71 The key strengths and weaknesses of the centre we have identified include the following:

- Dorchester benefits from a strong historic character which is promoted through a wide range of attractions and museums. There would appear to be further potential to promote and market these attractions more widely to help boost the town's visitor and tourist economy.
- There is a below average vacancy rate which is a positive sign that the centre is performing well.
- The pedestrianisation of Cornhill/South Street and the recently completed southern end of South Street helps to create a pleasant pedestrian environment and enhanced shopping experience. The wide range of non-food stores contribute towards the good health of the town centre. The audit identified a good complementary mix of both high street and independent stores.
- Whilst we consider that convenience goods provision in the centre is adequate, there is a potential 'gap' in the grocery market and the potential for the expansion of an existing food store , and additional independent provision, subject to need and market demand.
- There is a strong provision of financial services, including high street banks across the town centre.
- The recent development at Brewery Square has significantly increased the town's commercial leisure provision, particularly through the cinema and a number of branded food and beverage operators that are new to the town.
- Although the Brewery Square scheme has benefitted the town centre's overall commercial leisure offer and environment around the station, its location outside the PSA means that it has not necessarily had a significant positive impact on the PSA per se, due to relatively poor linkages and connections. As a result, we consider that linkages between Brewery Square and the PSA should be enhanced as a priority.
- In the face of competition from Brewery Square it is also important that the PSA's retail and leisure offer is improved over the plan period to avoid a complete displacement of visitors, footfall and leisure expenditure.
- There are three potential development opportunity sites on the edge of the PSA that could accommodate new retail, leisure and mixed use development over the plan period – namely the Charles Street, Trinity Street and Fairfield Road sites. We consider the availability and suitability of these sites to accommodate new retail-led development in more detail in Section 23 to this report. Notwithstanding the findings of the retail and leisure need assessment (see Sections 19 and 20), we advise that any food or non-food retail and leisure uses proposed for these sites would need to be carefully planned, designed and developed to ensure that they generate the maximum benefits for the town centre's vitality and viability as whole; including promoting strong pedestrian connections and linked trips. Any proposals for new retail and leisure uses on these edge-of-centre sites would also necessarily need to be subject to the sequential and impact 'tests' set out in paragraph 26 of the NPPF.

14 BRIDPORT HEALTH CHECK

Context

- 14.1 Bridport is the second largest town in West Dorset. It is situated around 20km west of Dorchester on the southwest coast. It is recognised as a gateway town for the World Heritage Site of the Jurassic Coast and is located within the Dorset Area of Outstanding Natural Beauty (AONB). The town has a strong industrial heritage of rope-making, although this is now less extensive than it was.
- 14.2 The *West Dorset and Weymouth Local Plan* (2015) designates Bridport as a 'Town Centre' and it also performs an important role as the service centre for a large surrounding rural area in the west of the district. It sets out that by 2031, Bridport will still be seen as a 'working town' with a balance between housing and jobs, and a vibrant town centre providing shopping, cultural and other facilities to the rural hinterland.
- 14.3 The town extends south to the harbour at West Bay, formerly a small fishing village, located just under 2 miles away. We consider West Bay to have an influence on Bridport's overall vitality and viability, as there are a high number of day and overnight visitors staying in the hotels, campsites and holiday homes in this area. These visitors combine their stay at/visit to West Bay with a visit to Bridport to use the services, retail and facilities.
- 14.4 The town centre, as defined on the Local Plan Policies Map forms a 'T' shape running from just south of the Church Street junction on South Street to West Street/East Street. To the west, the town centre boundary runs from the St Michael's Lane/West Street junction to the East Street/Barrack Street/King Street junction.
- 14.5 The defined **PSF** runs along the main length of the southern side of both West Street and East Street. Along the northern side, the PSF runs along the main stretch of East Street and far east end of West Street. The defined SSF includes those units situated along the southern end of South Street, far east end of East Street as well as the units on the northern side of the street on West Street.

Retail Composition & Diversity of Uses

- 14.6 Tables 14.1 and 14.2 below summarise the centre's retail and service mix, and diversity of uses based on total outlets and floorspace recorded by the latest Experian Goad Category Report.

Table 14.1: Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	77	39.1%	31.1%	124
Convenience	17	8.6%	8.8%	99
Retail Service	25	12.7%	14.4%	90
Leisure Service	43	21.8%	23.9%	92
Financial & Business Service	27	13.7%	10.3%	131
Vacant Retail & Service Outlets	8	4.1%	11.2%	36
TOTAL:	197	100.0%	100.0%	-

Source: Experian Goad Category Report (April, 2016)

Table 14.2: Current Retail and Service Offer – Floorspace

Category	Floorspace (sqm)	% of Total Outlets	UK (%)	Index
Comparison	14,130	36.7%	35.0%	103
Convenience	3,632	9.4%	15.2%	62
Retail Service	3,605	9.4%	6.8%	139
Leisure Services	11,037	28.6%	25.0%	116
Financial & Business Service	5,583	14.5%	7.7%	185
Vacant Retail & Service Outlets	548	1.4%	9.7%	15
TOTAL:	38,536	100.0%	100%	-

Source: Experian Goad Category Report (April, 2016)

Notes: The floorspace figures are derived from the relevant Goad Plan (see Section 5). Figures may not sum due to rounding.

Convenience Offer

- 14.7 There are 17 convenience units in the defined town centre trading from a total (Goad) floorspace of 3,682 sqm (39,100 sqft). This represents 8.6% of total outlets and 9.4% of all floorspace in the town centre, which is below the respective national averages of 8.8% and 15.2%. We note that the number of convenient outlets in the centre expressed as a proportion of total outlets has decreased from the 10.9% recorded by the 2008 Retail Study.
- 14.8 The town's food and convenience offer is anchored by Waitrose. This is supplemented by 3 butchers, a convenience store (Spar), 2 greengrocers, 4 health food stores, a grocers/delicatessen and a shoe repair shop. We understand that although there were 4 bakers & confectioners recorded as part of the 2016 Goad Category Report, there are now just two (Leakers and Punch & Judy).
- 14.9 There are also a number of food stores located outside the town centre that serve the catchment population's 'bulk' and 'top-up' food shopping needs; namely Morrisons, Co-op and Lidl. Looking at the West Dorset district area, Bridport town centre is capturing 4.0% of expenditure with Waitrose capturing the vast majority (2.9%) of this share. By contrast, the out of centre food stores (namely Morrisons and Lidl) capture 10.3% of the market share. Morrisons is achieving the highest market share of 6.3%. Thus, it is recognised that the out of centre food stores are performing better than town centre stores (namely Waitrose).
- 14.10 In summary, whilst Bridport's total convenience offer is below the national average, the town does appear to have a good choice of multiple and independent food and convenience outlets that cater for the needs of its local population.

Comparison Offer

- 14.11 There are 77 comparison goods retailers located within Bridport town centre trading from a total floorspace of 14,130sqm (152,100 sqft). This represents 39.1% of total units and 36.7% of all recorded floorspace, which is above the national average of 31.1% and 35.0% respectively. Notwithstanding this, we note that comparison goods units represented some 52.1% of total outlets in the centre according to the 2008 Retail Study.
- 14.12 The town has a good selection of shops, mainly independent business, selling a range of different sub-categories including: book shops, art shops, clothing, electrical and other durable goods, jewellery, newsagents and stationers, soft furnishings, toys and games.

- 14.13 We note that Bridport has 11 charity shops with is equivalent to 5.6% of total units in the centre and is significantly above the national average of 2.72%. Although charity shops contribute to the diversity and health of town centres, it is important that any further proliferation of these stores is carefully monitored to prevent over-provision.
- 14.14 The twice weekly market also sells a range of comparison (and convenience) goods products including clothing, hardware, books and electronics.
- 14.15 In summary Bridport has a good comparison offer that is above the national average. Notwithstanding this, the centre would benefit from enhancing its offer and attracting new multiple and independent retailers, subject to any identified economic capacity and market demand.

Service Offer

- 14.16 There are 95 service outlets in Bridport town centre. They account for 48.2% of all units, which is in line with the national average of 48.6%. This represents a significant increase from the 2008 study which identified that just 32.7% of total units were comprised of service uses.
- 14.17 The following provides a brief summary of provision in the different service categories:
- There are 25 **retail services**. This represents 12.7% of total outlets, which is below the national average. This category is mostly made up of health and beauty outlets (15 units) suggesting there is an overprovision of this use. Retail service provision also includes a clothing/fancy dress hire shop, a dry cleaners/laundrette, 3 opticians, a post office, 2 travel agents and a vehicle repair shop.
 - In terms of **financial services**, the 27 outlets represent 13.7% of total units in the centre, which is above the national average of 10.3%. Financial services include a building supply service, a building society, 3 financial services, 4 legal services, 12 property services (including estate agencies), a printing service and 5 retail banks (i.e. TSB, HSBC, Nationwide, Natwest and Barclays).
 - There are 43 **leisure service** outlets, which is equivalent to 21.8% of total units and is below the national average of 23.9%. Leisure provision includes 2 bars, 7 cafés, 2 betting offices, 2 cinemas/theatres (Electric Palace and Bridport Arts Centre), 10 fast food/takeaway shops, 2 hotels/guesthouses, 8 public houses and 8 restaurants. The centre has a relatively strong evening economy with an above average provision of pubs and a good choice of restaurants. The majority of restaurants and cafés in the centre are local businesses although Costa Coffee and Coffee#1 are represented.
- 14.18 In addition to the above, Bridport Museum is situated on South Street and reopened in July after a £1.3 million redevelopment. The Lyric Theatre is also located on Barrack Street.
- 14.19 There is a lack of overnight accommodation in the centre; given the links to West Bay we consider that there could be opportunities for the development of hotels/guesthouses in the town centre to accommodate visitors.
- 14.20 Given the size and role of the centre, we consider that the overall representation of services is appropriate. We assess the potential need for new commercial leisure uses in more detail in **Section 20** of this study.

Vacancies

- 14.21 There were 8 vacant units recorded by Experian Goad. This is equivalent to a vacancy level of 4.1%, which is significantly below the national average of 11.2%. This low vacancy rate is a positive sign of a healthy town centre which is performing well.

Multiple and Independent Retail Representation

- 14.22 The *2016 Experian Goad Category Report*, identified that there are 51 multiple retailers in the defined town centre area. This includes a number of key operators such as Boots, Waitrose, New Look, Carphone Warehouse, Superdrug, Waterstones, Holland & Barrett, Mountain Warehouse, Peacocks, WH Smith, M&Co and Fatface. Multiple retailers are mainly concentrated along the centre of West Street/East Street.
- 14.23 The majority of retailers in the town centre are independents. There is a particularly strong concentration of quality local shops and services along South Street.
- 14.24 In summary, it is considered that there is a good mix of both independent and multiple retailers. The high number of locally owned stores is recognised as a key strength of the town centre, and this should be maintained and enhanced to help underpin the town's overall vitality and viability.

Markets

- 14.25 A market is held every Wednesday and Saturday along the three main Streets (South Street, East Street and West Street). Trading hours are between 8am until mid-afternoon. There are a wide selection of stalls selling food items, hardware, flowers, paintings, books and electronics. There are also a number of street food stalls. The Saturday market is particularly popular with both traders and visitors selling many antiques and artisan goods.
- 14.26 The Farmer's Market is held on the second Saturday of the month in the Arts Centre, situated on South Street. The market sells a range of fresh, local produce. The Bridport Vintage and Antique Market takes place on the last Sunday of the month between March and October. This is held just outside of the town centre on the St Michael's Trading Estate.
- 14.27 The market is considered to be a big draw for visitors to Bridport and contributes to the town's success.
- 14.28 There are also around 200 town centre events every year, ranging from carnivals, to live music and late night Christmas shopping.

Retailer Demand & Prime Zone A Rents

- 14.29 The *Requirement List* (June 2017) shows that there are 10 operators with stated requirements for representation in the town centre; equivalent to a total minimum floorspace of 4,691 sqm (50,500 sq ft) gross. These include a range of retailers, leisure and hotel operators including: British Heart Foundation, Lidl, Age UK, Vets4Pets, Premier Inn and Cotton Traders. Please note that there was no market information on current prime Zone A rental values in Bridport at the time of preparing this study.

Household Survey

- 14.30 We have drawn on the findings of the household telephone interview survey (HTIS) to help gauge customers' views and perceptions of the town centre as a place to shop and visit for a range of leisure uses and other activities.

Table 14.3: Features respondents liked about Bridport town centre

Response	Study Area
Good range of independent shops	21.8%
Attractive environment/nice place	17.1%
Nothing/very little	15.9%
Close to home	10.8%
The street markets	10.8%
Good range of non-food shops	9.4%
Traditional	7.4%
Good pubs, cafes or restaurants	4.4%
Makes a change from other places	3.4%
Friendly people/nice atmosphere	3.2%

- 14.31 The majority of respondents indicated that they liked the range of shops operated by independent retailers in Bridport town centre, which confirms the findings of the health check regarding the strong mix of independent and high street stores. Other respondents also identified the attractive environment and traditional nature of the town centre as features they liked. Respondents also considered Bridport to have a good range of food and beverage outlets and a good range of non-food stores.
- 14.32 Respondents were also asked what, if anything, they would improve in Bridport that would encourage them to visit more. The table below provides a summary of the most frequently raised suggested improvements for the town centre from respondents.

Table 14.4: Key improvements for Bridport town centre

Response	Study Area
Nothing	62.8%
Don't know	24.2%
More/better parking	3.7%
More national multiple shops/High Street shops	2.1%
More independent shops	1.8%
Better access by road	0.8%
Better public transport	0.8%
More/better food shops	0.7%
Less busy	0.7%
Less charity shops	0.7%

- 14.33 The majority of respondents across the study area stated 'nothing' or 'don't know' (87%). Respondents expressed a need for better accessibility to and within the centre including more/better parking, better access by road and better public transport. Other responses included more high street shops, more independent stores, better food shops and fewer charity shops.

Environmental Quality

- 14.34 Bridport town centre benefits from an attractive historic environment. Buildings and shop frontages are generally well maintained across the town centre helping to create a pleasant shopping environment. Bridport has a strong heritage with around 500 listed buildings and structures in the main urban area. The majority of the centre is also within the designated conservation area.
- 14.35 There is little evidence of vandalism and litter in the centre, and all the main streets across Bridport were clean and tidy at the time of our visits. Trees line the east side of the road along South Street as well as along parts

of West Street and East Street, and contribute to an attractive environment. Hanging baskets further enhance the street scene.

- 14.36 Although the centre is bounded by the River Brit and River Asker, the centre has a lack of green spaces. Notwithstanding this, there is a public 'square' located on South Street, immediately to the south of the Tourist Information Centre. This area has an abundance of public seating and has decorative planters. The space is used by performers, making it a pleasant communal town centre space and focal point.
- 14.37 We consider that the provision of street furniture is adequate with litter bins, street lamps and public seating located across the centre.
- 14.38 Overall, the town centre has an attractive environment with a high quality built form which is integral to the centre's character and appeal.

Accessibility

- 14.39 Bridport is a fairly accessible town centre situated just north of the A35, with access to Dorchester in around 30 minutes. The main roads throughout the centre are not pedestrianised and there are no one-way systems operating. However, congestion does not appear to be a major issue on the town centre's roads.
- 14.40 There is no railway station located in Bridport. The nearest stations are Dorchester and Axminster which are both around a 30 minute drive from Bridport. Regular bus services also serve the town centre running to and from the surrounding towns and villages including: Beaminster, Weymouth, Axminster and Exeter. Bridport bus station is located to the west of West Street. During the summer months a park and ride service is in place between Bridport and West Bay.
- 14.41 The town is served by a number of council owned car parks including:
- East Street car park (92 spaces);
 - Wykes Court car park (150 spaces);
 - Football Club car park (96 spaces);
 - Hope Terrace car park (22 spaces);
 - Rope Walk car park (156 spaces);
 - South Street car park (108 spaces); and
 - West Street car park (92 spaces).
- 14.42 There are also on-street parking spaces available.
- 14.43 In terms of pedestrian accessibility, pavements are wide across the centre and this helps to enhance the overall pedestrian experience. The town centre layout is easy for pedestrians to navigate with essentially only two main shopping streets. There is good signage along South Street, although we consider that this could be improved across the rest of the town centre.
- 14.44 Although there are an adequate number of pedestrian crossings along South Street and West Street, an additional crossing could also benefit pedestrians along East Street.
- 14.45 In summary, accessibility to and within Bridport is considered to be adequate.

Out of Centre Provision

- 14.46 Bridport has limited out of centre retail provision. Morrisons is situated around 0.5 miles outside of the town centre, which is equivalent to a 10 minute walk. The store also has a petrol filling station. Further out of the town centre to the northeast are Lidl and Co-op supermarkets situated along St Andrew's Road. Both stores are around 0.8 miles outside of the town centre, a 15 minute walk away.

New Investment & Potential Development

- 14.47 The 2015 Local Plan identifies the potential for future town centre expansion. This includes further retail and office development on the Rope Walks car park (which serves Waitrose) and coach station site, also used for car parking. Policy 'Brid 4' of the Local Plan identifies these two sites as the preferred locations for the future expansion of the town centre, with any scheme needing to retain an appropriate amount of public car parking.
- 14.48 Just outside of the town centre, the regeneration of St Michael's Trading Estate is also identified as having the potential for mixed use redevelopment to help secure the retention of the historic buildings as well as providing local jobs. An application (Ref: WD/D/16/002853) was approved in August 2017 for this site for the redevelopment, including part demolition of listed and unlisted structures, and refurbishment of retained structures to provide 9 residential units and a net decrease of 47 sqm of light industrial floorspace.
- 14.49 Land at Vearse Farm is allocated within the Local Plan to meet the long term needs of the town with new homes, employment workspace and community facilities including a new school, leisure and recreational facilities and public open space. The Local Plan sets out that this urban extension could deliver around 760 new homes and approximately 4 hectares of employment land. An outline application (Ref: WD/D/15/002010) for the development of up to 760 dwellings, 60 unit care home, 4 hectares of land for employment use, mixed use local centre, primary school and associated playing fields, areas of public open space and allotments and formation of two new accesses was submitted in September 2015.

Summary

- 14.50 In summary, the health check assessment has demonstrated that overall Bridport is a vital and viable centre. The key strengths and weaknesses of the centre that we have identified include the following:
- There is a relatively good range of non-food stores in the town centre.
 - The independent retail offer is strong and is a key feature of the town centre.
 - The proportion of food stores is also in line with national average and is considered good for a town of this size. The centre's food and convenience offer is anchored by Waitrose, although Morrisons and Lidl are situated outside of the centre. In-centre provision is also supplemented by a range of local stores as well as the twice weekly street market.
 - Bridport has a low vacancy rate with only 4.1% of units being vacant in 2016, suggesting the town centre is performing well.
 - There is an overprovision of charity shops which should be carefully monitored.
 - There is a strong representation of financial services including most of the major high street banks.
 - Although leisure service provision is just below average, there appears to be a relatively strong evening economy for a town of this size.
 - The centre is a traditional market town and the historic architecture contributes to the street scene and creates an attractive shopping environment.

- The centre also benefits from regular street markets and specialist markets that make an important contribution to its overall vitality and viability.

15 SHERBORNE HEALTH CHECK

Context

- 15.1 Sherborne is a historic market town in north west Dorset, situated on the River Yeo and A30 road, approximately 6 miles east of Yeovil. As well as having strong links with Yeovil, the town also has good connections with Dorchester to the south, Wincanton to the north, and Sturminster Newton and Shaftesbury to the east. The town is composed of a number of medieval and Georgian buildings, many of which are built from a distinctive ochre ham stone.
- 15.2 Sherborne is well known in the area for its private schools which make a significant contribution to the local economy. The private schools in the town include Sherborne School a British independent boys' school and Sherborne Girls, an independent day and boarding school for girls. Sherborne school is located in the heart of the town, and remains one of the top independent schools in Britain.
- 15.3 The *West Dorset, Weymouth & Portland Local Plan (2015)* identifies Sherborne as a town centre 'where the retail shops are concentrated, together with leisure, business and other main town centre uses' (paragraph 4.4.2). Sherborne is a traditional town centre with retail and town centre uses focused along Cheap Street, as well as Long Street and Half Moon Street, both of which are occupied by predominantly secondary uses. The centre's primary frontage (as shown on the Proposals Map) includes the length of Cheap Street between the White Hart public house to the northern end of the street, and the Conduit on the southern end of the street.

Retail Composition & Diversity of Uses

- 15.4 Tables 15.1 and 15.2 summarise the centre's retail and service mix, and diversity of uses based on the total outlets and floorspace recorded by Experian Goad Category Report.

Table 15.1 Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	79	45.1%	31.1%	143
Convenience	15	8.6 %	8.8%	99
Retail Service	25	14.3%	14.4%	101
Leisure Service	27	15.4%	23.9%	65
Financial & Business Service	21	12.0%	10.3%	115
Vacant Retail & Service Outlets	8	4.6%	11.2%	41
TOTAL:	175	100.0%	100.0%	-

Source: Experian Goad Category Report (February 2016). Figures may not sum due to rounding

Table 15.2 Current Retail and Service Offer - Floorspace

Category	Floorspace (sqm)	% of Total Outlets	UK (%)	Index
Comparison	9,300	35.5%	35.0%	100
Convenience	5,007	19.1%	15.2%	126
Retail Service	2,462	9.4%	6.8%	139
Leisure Services	4,803	18.4%	25.0%	74
Financial & Business Service	3,400	13.0%	7.7%	165
Vacant Retail & Service Outlets	1,208	4.6%	9.7%	49

TOTAL:	17,810	100.0%	100%	-
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Source: Experian Goad Category Report (February 2016). Figures may not sum due to rounding.

Convenience Offer

- 15.5 There are 15 convenience units in the defined survey area trading from a total floorspace of 5,007 sqm (53,900 sqft). This represents 8.6% of total units, which is in line with the national average of 8.8%; although current floorspace provision (19.1%) is above the national average (15.2%).
- 15.6 The centre's main convenience provision is anchored by Sainsbury's on Ludborne Road, and Waitrose located off Newland which opened in 2014. The provision is also supported by 8 bakers, 2 grocers & delicatessens, a greengrocers, a health food shop, and an off license.
- 15.7 Overall we consider that the centre has a relatively good provision of food and convenience retailing that meets the needs of its local catchment population.

Comparison Offer

- 15.8 According to the 2016 Goad Category Report, Sherborne has 79 comparison outlets and a total floorspace of 9,300 sqm (100,100 sq ft.). This represents 45.1% of total units and is significantly above the national average of 31.1%. The current floorspace provision provides 35.5% of total floorspace in the centre, which is in line with the national average of 35.0%.
- 15.9 Across the different comparison sub-categories, the centre has a good representation of antique shops, charity shops, general clothing stores, DIY & home improvement stores, ladieswear stores, and jewellery stores.
- 15.10 Overall, we consider that Sherborne has an excellent comparison provision for a centre of its size, catering well for its local population.

Service Offer

- 15.11 As **Table 15.1** shows, there are 73 service outlets in Sherborne. They represent 41.7% of all units which is below the national average of 48.6%. However the current service-related floorspace of 10,665 sqm (114,800 sq ft.) represents 40.8% of total floorspace and is above the national average of 39.5%.
- 15.12 The following provides a brief summary of provision in the different service categories:
- There are 25 **retail services**, which represents 14.3% of total outlets. This is in line with the national average of 14.4%. This category is mostly made up of health and beauty outlets (13). There are also 3 dry cleaners, 3 clothing hire shops, 3 opticians, a post office and a travel agency. There are no filling stations, vehicle rentals, or vehicle repair services which form part of key retail services.
 - In terms of **financial services**, there are 21 outlets, which represents 12.0% of total units and is above the national average of 10.3%. The mix of services is dominated by property services (13) and retail banks (4). The representation of financial services is strong, particularly with regards to the number of banks, in light of the declining numbers of banks within many of the other centres within the study. However, we understand that Natwest situated on Cheap Street is expected to close in 2018.
 - There are 27 **leisure services**. This is equivalent to 15.4% of total provision which is significantly below the national average of 23.9%. The offer includes cafés (8), public houses (6), restaurants (5), and fast food takeaways (4). Although locally there is a perception that the centre has too strong a concentration of cafes, the number of cafe units (4.57%) is actually in line with the national average. Since the overall

leisure provision is significantly below the national average, we do not consider the concentration of cafes in the centre to be an issue.

- 15.13 In summary, whilst the provision of retail and financial services in Sherborne is good, the provision of leisure services is significantly below the national average and as such there is an opportunity to improve such provision.

Vacancies

- 15.14 According to the 2016 Experian Goad report, there are 8 vacant outlets in Sherborne, which is equivalent to a vacancy level of 4.6% and is significantly below the national average of 11.2%. This is a positive indication that the centre is vital and viable.

Multiple and Independent Retail Representation

- 15.15 The 2016 Experian Goad Category Report identified there 46 multiple retailers in the surveyed area. This includes a number of prominent names including mixed goods retailers such as Boots and WHSmith, and supermarkets such as Sainsbury's and Waitrose. In terms of clothing, there are a number of quality national retailers located within the town centre such as Joules, Fat Face, Mountain Warehouse and Crew Clothing. The centre is composed predominantly by independent retailers and service providers; approximately 73.7% of occupants within the town centre are independents. The 129 independent retailers make the centre more diverse and contribute to its overall vitality and viability.

Markets

- 15.16 There are several local markets in the town. The Pannier Market on the Parade takes place every Thursday and Saturday although we understand that there is potential to extend this as the number of stalls is relatively low. The Country Market is held in the Church Hall on Digby Road on Thursday mornings between 9.15am and 11.15am. There is also a Farmers' Market on the 3rd Friday of every month on Cheap Street between 9.00am and 1.00pm. The Sherborne Vintage Market takes place on the last Saturday of every month at the Digby Memorial Church Hall.
- 15.17 Every October, 'Pack Monday' takes place to signify the workers completing the construction of the Abbey. The event includes a fun fair, market and musical processions.

Retailer Demand & Prime Zone A Rents

- 15.18 In terms of current market demand for representation in the town centre, as set out in the most recent Requirement List (June 2017), there are 9 operators with published requirements, equivalent to a total floorspace of between 2,127 sqm and 4,947 sqm (between 22,900 and 53,250 sq ft) gross. These include retailers such as Steamer Trading Cookshop, Between the Lines, Lidl, Superdrug, Barkers, Jigsaw and Mind, as well as the veterinary clinic Vets4Pets and a Marston's Public House. No information is available regarding prime zone A rents in Sherborne.

Environmental Quality

- 15.19 Sherborne benefits from a traditional, historic town centre. Buildings are generally well-maintained throughout the town centre and the predominantly medieval and Georgian architecture helps to create an appealing and

pleasant environment. The town centre lies within the Sherborne Conservation Area and majority of buildings within the centre are listed, particularly along Cheap Street.

- 15.20 On the whole shop fronts are tidy and there are no concentrations of vacant units. The centre benefits from well-maintained planters and hanging baskets, which make the town welcoming and attractive.
- 15.21 However there are limited areas of public open space within the centre, with only one area located on Cheap Street in close proximity to the Conduit. Visitors to the centre do benefit from a number of parks at the edge of the centre including Pageant Gardens and Paddock Garden.
- 15.22 Overall, the environmental quality of Sherborne Town Centre is good.

Accessibility

- 15.23 Sherborne Town Centre has relatively good road links; it is located off the A30 which is the most prominent route between Yeovil to Shaftesbury; and off the A352 which links the town to Dorchester. Whilst the centre hosts a number of car parks, none of them are free of charge. These car parks include:
- Acreman Street (47 spaces);
 - Coldharbour (72 spaces);
 - Culverhayes (273 spaces);
 - Digby Hall (49 spaces);
 - Newland North (70 spaces); and
 - Old Market Yard (109 spaces).
- 15.24 Sherborne has a railway station which is located south of the town centre on Station Road. South West Trains operate hourly throughout most of the week between Exeter St David's, Sherborne, Salisbury and London Waterloo Station. There is an adequate bus service, which operates relatively regular services to Yeovil, Wincanton, Marnhull, Blandford Forum and Dorchester.
- 15.25 Sherborne's main high street, Cheap Street, has narrow pavements on each side of the road widening towards the bottom of the street near the Conduit. Efforts have been made to improve pedestrian accessibility within the town however, and Cheap Street is pedestrianised from 12pm-4pm Monday to Friday and from 11am-4pm on Saturdays.
- 15.26 Overall, Sherborne is a relatively accessible centre, which benefits from good road links, a railway station, and pedestrianisation of Cheap Street during limited hours Monday-Saturday.

Out of Centre/Town Provision

- 15.27 The main out of centre retail provisions are retail units located at Peel Shopping Park, located approximately 6.5km west of Sherborne Town Centre. The park is predominantly located on the east side of Yeovil fronting the A30. The retail park comprises 10,126 sqm (109,000 sq ft.) and largely includes (A1) comparison outlets such as Boots, Next, Pets At Home, Matalan, Argos, Sports Direct and Brantano. Planning permission was granted in July 2016 (App Ref: WD/D/16/000486) for an unrestricted, non-food retail warehouse unit and an extension of the car park. In a separate application, planning permission was also secured in September 2016 (App Ref: WD/D/16/001406) for an ancillary pod building which is to incorporate two food and drink units.

New Investment & Potential Development

15.28 The *West Dorset, Weymouth & Portland Local Plan* (2015) sets out the main opportunities within Sherborne for a mix of uses, including the following:

- **Land at Barton Farm** was allocated in the 2006 Local Plan for housing, employment and community uses, to meet the development needs of Sherborne up to 2016. This has been reallocated in the *West Dorset, Weymouth & Portland Local Plan* (2015) (see Policy SHER1. 'Land at Barton Farm'). Whilst the site has the benefit of outline planning permission for a mixed-use development of up to 279 dwellings with community uses and employment, the allocation will be retained in the plan until such a time as the development is built out. The site is currently under construction.
- **Newland Car Park North and Newland Car Park South** are identified for potential new retail-led development by Policy SHER2. '*Future Town Centre Expansion*', if there is a need for additional new retail floorspace.

15.29 Further regeneration opportunities in the town include the development of land to the rear of Sherborne Hotel which has planning permission for a 119 unit extra care facility and 24 bed hotel (see Policy SHER3. 'Land at Sherborne Hotel'); as well as the redevelopment of the former tennis courts as a new arts centre with access to the Old Market Place. In addition to this the development of the Former Gasworks Site, which was previously allocated in the 2006 Local Plan for housing and employment (see Policy SHER4. 'The Former Gasworks Site, Gas House Hill') is likely to take place in the coming years.

Summary

15.30 In summary the health check assessment has demonstrated that overall Sherborne is a vital and viable centre.

15.31 The key strengths and weaknesses of the centre include the following:

- The centre has a good convenience provision, which is anchored by a Sainsbury's and a Waitrose store. This is supplemented by other providers such as bakers, grocers, greengrocers, a health food shop and an off license.
- Sherborne has an excellent comparison offer which caters well for its local population. This is supplemented by a number of independent market stalls.
- Whilst the provision of retail and financial services in the town is good, the provision of leisure services is significantly below the national average and as such there is an opportunity for improvements. There is a gap in the town's leisure provision and there may be an opportunity to provide a cinema in Sherborne.
- Vacancy levels in the centre are low and there are no significant concentrations of vacant units or long term vacancies.
- Although there are a number of multiple retailers, the town is composed predominantly of independent retailers which contribute significantly to the diversity, vitality and viability of the centre.
- The environmental quality of the town centre is good. The traditional historic town centre, and well-maintained shop fronts and planters create a welcoming and attractive environment. Despite this, there is limited public seating in the centre, and there is also a lack of public open space. Improvements in these areas could enhance the shopping environment and as a result attract a larger number of visitors.
- In terms of accessibility, Sherborne is a relatively accessible centre. The town benefits from good road links, a railway station and the pedestrianisation of Cheap Street during limited hours Monday-Saturday.
- There are a number of key developments in the pipeline such as development of land at Barton Farm and the redevelopments of Sherborne Hotel and the Former Gasworks Site.

16 LYME REGIS HEALTH CHECK

Context

- 16.1 Lyme Regis is a coastal holiday town situated on the West Dorset and East Devon border within the Dorset AONB. It is located around 32 miles along the coast to the west of Weymouth and 25 miles due west of Dorchester. The village of Uplyme is situated to the northwest of Lyme Regis, connected by the B3165. Although located within East Devon district, the two centres are closely related to one another. Lyme Regis is recognised as being one of Dorset's main tourist destinations and a key centre for visitors to the World Heritage Coast as a result, there are a high number of second and holiday homes at 20% of the total housing stock (2011 Census). The *2015 Local Plan* sets out that by 2031 Lyme Regis will retain its unique coastal character whilst developing to meet local needs, as well as developing its role as a visitor and education centre with a strong identity based on its geological heritage.
- 16.2 The town centre, as defined on the Local Plan Policies Map, is tightly configured running northwest to southwest from the south of Silver Street along Broad Street to Bridge Street/corner of Church Street. The defined **PSF** comprises the length of Broad Street. The **SSF** includes nos. 47a to the church on the northern side of Silver Street as well as units along Bridge Street.
- 16.3 An area known as 'The Cobb' is situated to the southwest of the main town centre along the seafront. This is situated outside of the town centre boundary, as defined by the Council, but comprises a number of town centre uses including public houses, cafes, ice cream parlours and kiosk size units selling a range of comparison goods mainly geared towards visitors to the centre.

Retail Composition & Diversity of Uses

- 16.4 Tables 16.1 and 16.2 below summarise the centre's retail and service mix, and diversity of uses based on the total floorspace and outlets recorded in the latest Experian Goad Category Report.

Table 16.1 Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	49	40.5%	31.1%	128
Convenience	12	9.9%	8.8%	114
Retail Service	8	6.6%	14.4%	47
Leisure Service	38	31.4%	23.9%	133
Financial & Business Service	6	5.0%	10.3%	47
Vacant Retail & Service Outlets	8	6.6%	11.2%	59
TOTAL:	121	100.0%	100.0%	-

Source: Experian Goad Category Report (April 2015)

Table 16.2 Current Retail and Service Offer – Units

Category	Floorspace (sqm)	% of Total Outlets	UK (%)	Index
Comparison	5,416	30.7%	35.0%	87
Convenience	1,756	9.9%	15.2%	65
Retail Service	836	4.7%	6.8%	70
Leisure Services	8,398	47.6%	25.0%	193
Financial & Business Service	799	4.5%	7.7%	58
Vacant Retail & Service Outlets	455	2.6%	9.7%	28
TOTAL:	17, 205	100.0%	100%	-

Source: Experian Goad Category Report (April, 2015)

Notes: The floorspace figures are derived from the relevant Goad Plan (see Section 5). Figures may not sum due to rounding.

Convenience Offer

- 16.5 There are 12 convenience units in the survey area trading from a total (Goad) floorspace of 1,756 sqm (18,900 sq ft). This represents 9.9% of total outlets, which is above the national average of 8.8%. This figure has decreased since the 2008 Retail Study which identified an above average proportion of convenience units (14.1%). The current floorspace provision (9.9%) is below the national average of 15.2%.
- 16.6 The main convenience stores serving residents' needs in the town centre are Tesco Express and Co-op. The two stores are located in close proximity to one another on Broad Street. These stores are supported by 6 bakers and confectioners, 2 grocers and delicatessens and an off license. Although the proportion of food stores is above the national average we note that there is little variety of local provision. For example there are no butchers, fishmongers, frozen food stores, greengrocers or health food stores in the town centre. There is a fishmongers located on Cobb Road close to the Cobb, however this is situated outside of the town centre boundary.
- 16.7 There is also no large supermarket suitable for 'main food shopping' in the town centre. The nearest larger stores are located approximately a 15 minute drive away in Seaton or Axminster.
- 16.8 Overall, Lyme Regis is serving more of a local 'top up' shopping need. Although this is acceptable for a centre of this type and size, it does mean that a high proportion of local residents have to travel outside of the town centre to meet their main 'bulk' food shopping needs to centres such as Seaton, Bridport and Axminster. The results of the market share analysis support these conclusions. For example, when considering the West Dorset district area only, the town centre captures a 0.7% market share of 'main food shopping' purchases but a market share of 5.6% for 'top up food' purchases. Against this background we consider that Lyme Regis could benefit from expanding its local convenience provision and should a suitable site become available, attracting a larger supermarket to the town's centre.

Comparison Offer

- 16.9 There are 49 comparison goods retailers located within Lyme Regis trading from a total floorspace of 5,416 sqm (58,300 sq ft). They are primarily smaller independent shops and represent 40.5% of total units, which is above the national average of 31.1%. The proportion of comparison goods units recorded in the 2008 Retail Study was significantly higher at 53.3%. The current floorspace provision represents 30.7% of total floorspace in the centre, which is below the national average of 35.0%.

- 16.10 There are a range of different non-food shops in the town centre including: antique shops, art shops, booksellers, clothing, crafts/gifts, DIY/home improvement, florist, charity shops, jewellery, newsagents/stationers and toys. There is a significantly high proportion of crafts/gift shops, with 14.1% of units in this category. The majority of gift shops sell fossils and rocks, reflective of Lyme Regis' links to the Jurassic Coast; this high provision reflects the town centre's role as a popular tourist destination.
- 16.11 The Experian Goad audits show that there is no department store, menswear store, electrical store, music store, photography shop or mobile phone store in the centre.
- 16.12 Overall, we consider that whilst the range and number of comparison goods stores is reasonable. Many of the independent retailers cater for the tourist market rather than local trade. Based on our review we consider that the centre would benefit from a broader range of goods being sold to help readjust the balance between tourist and local needs.

Service Offer

- 16.13 There are 52 service outlets in Lyme Regis. They account for 43% of all units which is below the national average of 48.6%. This represents a significant increase in provision from the 2008 study when just 29.3% of total units were comprised of service uses.
- 16.14 The following provides a brief summary of provision in the different service categories:
- There are 8 **retail services**. This represents 6.6% of total outlets, which is significantly below the national average of 14.4%. Overall retail service provision is rather limited with 4 health and beauty outlets, a photo studio, a post office and a travel agent. There are no dry cleaners/laundrettes, opticians or repair/alteration services which form part of key retail services.
 - In terms of **financial services**, there are 6 outlets, which represent 5.0% of total units. This is below the national average of 10.3%. Financial services include 2 legal services, 3 property services and a retail bank. Overall, the representation of financial services is weak, particularly with regards to the number of banks. Since the 2015 Goad report, Lloyds Bank has closed in Lyme Regis (as of May 2017). Only one free cashpoint remains in the centre (outside Tesco Express).
 - There are 38 **leisure service** outlets. This is equivalent to 31.4% of total units, which is above the national average of 23.9%. Leisure provision includes 2 bars, 8 cafes, 2 cinemas/theatres, 3 clubs, 3 takeaways, 7 hotels/guesthouses, 4 public houses and 9 restaurants. We understand that the existing cinema (operated by Scott Cinemas) is currently closed due to fire damage from a blaze in 2016 and the Council are not aware of when this will reopen. The Marine Theatre hosts regular plays and shows alongside cinema screenings. There is an above average proportion of restaurants, cafés and public houses which benefit both visitors and local residents.
- 16.15 The Dinosaurland Fossil Museum is located on Coombe Street and displays local marine fossils. It is located within a Grade I listed building.
- 16.16 Given the size and role of the centre, we consider that the overall representation of services is in need of improvement. Although the number and range of leisure services is good, particularly in terms of uses related to the evening economy which we understand is strong during the summer months, there are few financial and retail services available, particularly for local residents.

Vacancies

- 16.17 There are 8 vacant units recorded by Goad. This is equivalent to a vacancy level of 6.6%, which is significantly below the national average of 11.2%. This low vacancy rate is indicative of a healthy town centre which is

performing well. During our site visit in December 2017, we noted one large vacant unit- the former Three Cups Hotel located on Broad Street. We understand that planning permission was granted for the part demolition of the building and development of the site to include a restaurant, apartments, shops, letting rooms and community room in 2015 however this has not been built out (ref: WD/D/14/002879). The unit has been vacant for a number of years, as a result of this there is a large blank frontage within the small, tightly confined shopping area.

Multiple and Independent Retail Representation

- 16.18 The 2015 Goad Category Report identified 14 multiple retailers in the surveyed area, including Boots, Tesco, Fat Face, WH Smith and Costa Coffee. High street clothing stores include Fat Face, Joules, Seasalt and Mountain Warehouse, all retailers that appeal to the tourists visiting the town centre. The town centre is constrained by the small units, meaning that there are few units suitable for national multiples.
- 16.19 The majority of retailers in the town centre are independents. There are a number of local gift shops selling local fossils and fudge. Many of the independent stores help to contribute to the uniqueness of the town centre.

Markets

- 16.20 There is no street market operating in Lyme Regis.

Retailer Demand & Prime Zone A Rents

- 16.21 According to the latest *Requirement List* (June 2017) there are 4 operators with published requirements for representation in the town; equivalent to a total minimum floorspace of 743 sqm (8,000 sq ft) gross. These are: The Original Factory Shop, Superdrug, Pets Corner and Forever England. Please note that we were not able to ascertain prime Zone A rental levels at the time of preparing this study.

Environmental Quality

- 16.22 Lyme Regis benefits from its coastal location and important role as a seaside town. The views out across the beach and sea create an attractive setting for both tourists and local residents. The majority of the town centre is also covered by the conservation area.
- 16.23 The town centre is relatively well maintained although a number of buildings could benefit from modernisation. Hanging baskets help to enhance the street scene. There is a need for additional street furniture along the length of Broad Street. For example the street could benefit from more litter bins and public seating.
- 16.24 Overall, the town centre hosts an attractive environment characterised by the seafront location. However we recommend improvements to a number of building frontages and an increase in street furniture.

Accessibility

- 16.25 Lyme Regis is served by the A3052. Road access throughout the town centre is poor as the narrow through streets (Broad Street, Bridge Street and Church Street) restrict access and cause high levels of congestion particularly during weekends and throughout the summer. Lorries travelling through the centre also causes issues in regards to accessibility.

- 16.26 Pavements are also relatively narrow which alongside the congested streets, means pedestrian accessibility and safety throughout the centre is compromised. There is also a lack of pedestrian crossings along the main through road.
- 16.27 There is no railway station in Lyme Regis. The nearest railway station is situated in Axminster with bus links to Lyme Regis. A number of bus services run to and from the town centre from surrounding locations including Exeter, Poole, Dorchester and Axminster.
- 16.28 The town is served by a number of car parks including:
- Broad Street car park (45 spaces);
 - Pitt House car park (70 spaces);
 - Woodmead car park (250 spaces);
 - Cabanya car park (71 spaces);
 - Monmouth Beach car park (70 spaces);
 - Charmouth Road car park (386 spaces);
 - Cobb Gate car park (17 spaces); and
 - Holmbush car park (393 spaces).
- 16.29 In summary, accessibility for both pedestrians and vehicles across the centre could benefit from improvements. Wider pavements and pedestrian crossings would also help to increase pedestrian safety.

Out of Centre Provision

- 16.30 There is no out of centre retail provision in Lyme Regis.

New Investment & Potential Development

- 16.31 The 2015 Local Plan identifies limited opportunities for town centre expansion and development. Policy LYME1 allocates land at Woodberry Down for housing. The planning applications granted proposed up to 108 dwellings in phase 1 and 2 with phase 1 being largely built out and phase 2 in progress.

Summary

- 16.32 In summary, the health check assessment has demonstrated that overall Lyme Regis is generally a vital and viable centre. The key strengths and weaknesses of the centre include the following:
- The centre's location on the coast helps to create an attractive and distinctive setting for shopping and other town centre uses. This also helps to reinforce its role as a key tourist destination in West Dorset.
 - There is no major food store catering for 'bulk' main food shopping trips in the town centre, which means that residents have to travel outside of Lyme Regis to meet their needs. This is reflected in the results of the market share assessment.
 - The centre's comparison goods offer mainly caters for the visitor and tourist market; for example there is an over-provision of gift shops compared with the national average. The range of stores in the town centre could therefore be diversified to cater for both local residents and visitors, subject to capacity and market demand.

- There is little financial and retail service representation in the centre. There are no retail banks, which means people have to travel to surrounding towns for banking services. There are also no opticians or launderettes/dry cleaners.
- Leisure service provision is strong. There is a good range of restaurants, cafes and pubs. Although the cinema is currently closed, it is expected to reopen once the recent fire damage has been repaired.
- The town centre vacancy rate is low indicating a healthy town centre performance.
- Accessibility throughout the town centre for both pedestrians and vehicles is poor. Roads are narrow causing congestion which combined with narrow streets and a lack of pedestrian crossings creates an unsafe pedestrian environment.
- We consider that the existing tourism offer is appropriate for the size of the centre and the level of parking and pedestrian accessibility in the centre.

17 BEAMINSTER HEALTH CHECK

Context

- 17.1 Beaminster is a small rural market town situated at the head of the valley of the River Brit and within the Dorset Area of Outstanding Natural Beauty. The town is located approximately 5 miles north of Bridport in Dorset, and 6 miles south east of the Somerset town of Crewkerne. The town hosts the Beaminster Festival, which is an annual nine-day music and art festival.
- 17.2 The *West Dorset, Weymouth & Portland Local Plan* (2015) identifies Beaminster as a 'Large Local Centre'. The Local Plan, however, does not designate a town centre boundary or any PSF or SSF. Notwithstanding this, we have identified that the main shopping areas include Hogshill Street, Shadrack Street, Church Street, The Square and Prout Hill.

Retail Composition & Diversity of Uses

- 17.3 Table 17.1 below summarises the centre's retail and service mix, and diversity of uses. This is based on online sources and our visit to the town centre, as the centre is not covered by Experian Goad

Table 17.1: Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)	Index
Comparison	15	38.5%	31.1%	122
Convenience	5	12.8%	8.8%	147
Retail Service	6	13.4%	14.4%	94
Leisure Service	8	20.5%	23.9%	87
Financial & Business Service	4	10.3%	10.3%	98
Vacant Retail & Service Outlets	1	2.6%	11.2%	23
TOTAL:	39	100.0%	100.0%	571

Source: Google Maps (July 2016)

- 17.4 Please note that there is no data available regarding retail and service use floorspace in Beaminster.

Convenience Offer

- 17.5 There are 5 convenience units in the defined centre. This represents 12.8% of total units, which is above the national average of 8.8%. The centre's main convenience provision consists of the Co-op on Church Street, which is supported by 2 bakers, a butchers and a greengrocers. As such, we consider that there is a good provision of food and convenience retailing in the area, which meets the needs of the local population.

Comparison Offer

- 17.6 There are 15 comparison units, which represents 38.5% of total units. This is significantly above the national average of 31.1%. In terms of its comparison offer, the centre is dominated by independent comparison retailers. A variety of comparison goods retailers are represented in the centre including crafts and gift stores, charity shops, general furniture stores, DIY and home improvement stores, chemists, florists and antiques stores. Overall, we consider Beaminster has a good comparison provision, catering well for the local population.

Service Offer

- 17.7 There are 18 service outlets in Beaminster. They account for 44.2% of all units, which is below the national average of 48.6%. The following provides a brief summary of provision in the multiple service categories.
- There are 6 **retail services**, which represent 13.4% of total units, and is below the national average of 14.4%. This category is predominantly made up of health and beauty outlets, (5), with the other unit occupied by the post office.
 - There are 4 **financial & business services**. This represents 10.3% of total outlets, which is in line with the national average of 10.3%. The service businesses are wholly made up of property services such as Symonds and Sampson and Marshwood and Mayfair. There are no banks in the town since HSBC shut down the last remaining bank in 2012.
 - There are 8 **leisure service** outlets within the town. This is equivalent to 20.5% of total units, which is just slightly below the national average of 23.9%. Leisure provision includes restaurants (3), cafés (2), public houses (2) and a fast food takeaway.
- 17.8 Overall, we consider that whilst Beaminster has an adequate provision of retail, financial and business services, the town has a poor leisure service provision and no bank. In order to enhance the town, we suggest that improvements are made to its leisure provision, subject to market demand, in order to attract visitors and maintain and enhance the centre's vitality and viability.

Vacancies

- 17.9 We only recorded one vacant unit in Beaminster at the time of our site visit. This is equivalent to a vacancy level of 2.6%, which is significantly below the national average of 11.2%. This indicates that Beaminster is performing extremely well in terms of vacancy levels.

Multiple and Independent Retail Representation

- 17.10 There is only one multiple retailer within the town; namely the Co-op. The centre's offer is largely dominated by independent businesses, which create a diverse and distinctive shopping environment, and make a significant contribution to the town's overall vitality and viability.

Markets, Retail Demand and Prime Zone A Rents

- 17.11 There are no markets within Beaminster. There is also no information available regarding retailer requirements and prime Zone A rents.

Environmental Quality

- 17.12 Beaminster Town Centre benefits from a number of historic routes which lead from the market square. Such routes, along with the local building materials, give the centre a distinct character. The whole of the town centre is covered by a conservation area.
- 17.13 The town centre is considered to be clean and tidy, with little evidence of litter or vandalism. The buildings and shop fronts are well maintained and flower planters and hanging baskets help to enhance the street scene and make the town more appealing.
- 17.14 Although Beaminster has a lack of green space within the centre, this is not considered to be an issue given its close proximity to the countryside and access to the memorial playing field. The town has a public 'square'

located on Hogshill Street which provides a central meeting point within the town. This square however is predominantly used as a car park.

- 17.15 Street furniture provision within the centre is considered to be good with litter bins, street lamps and public seating located within the town.
- 17.16 In summary, the town centre has an attractive environment which is of a high quality.

Accessibility

- 17.17 The town has relatively good road links; the main road running through Beaminster is the A3066, which leads south to Bridport and north to Mosterton and towards Crewkerne. Traffic in the town has been identified as an issue since the A3066 brings a lot of vehicles through the centre.
- 17.18 There are two main car parks in the centre, namely The Square car park which offers a maximum stay of 2 hours (26 spaces), and Yarn Barton car park which offers both long and short stay parking (73 spaces).
- 17.19 The town does not have a railway station; the nearest rail link is at Crewkerne, Somerset which is on the Exeter St. David's to London Waterloo line. Whilst bus routes 40, 53 and 740 serve the town and offer links to Bridport and Yeovil, services are infrequent and many run only on school days.
- 17.20 In terms of pedestrian accessibility, the town has narrow pavements which make it difficult for visitors to move around the centre. Furthermore, Beaminster's only pedestrian crossing is the zebra crossing near the Post Office. We consider that there is a need for more pedestrian crossings in the centre to bring about improvements to pedestrian safety. Despite this, the layout of the town centre makes it easy for pedestrians to navigate. There is also good signage in the centre of the town near the Square, however this could be extended to the centre's edges.
- 17.21 Overall, we consider accessibility in and around Beaminster Town Centre to be adequate. Whilst vehicular accessibility is good, we consider improvements to public transport and pedestrian accessibility to be particularly crucial in order to attract more visitors to the centre.

Out of Centre Provision

- 17.22 There are no major stores outside of Beaminster Town Centre.

New Investment & Potential Development

- 17.23 According to the *West Dorset, Weymouth & Portland Local Plan* (2015), the main opportunities for development in Beaminster include the following:
- **Land to the north of Broadwindsor Road** - Policy BEAM1 'Land to the north of Broadwindsor Road' identifies this site to the west of Beaminster to have the capacity to provide about 120 homes and approximately 0.5ha of employment land. Live-work units would be supported as part of this development. In January 2018 an outline application (WD/D/18/000115) for residential development of up to 100 dwellings and associated infrastructure has been submitted for consideration.
 - **Land at Land End Farm off Tunnel Road, north of Beaminster** - Policy BEAM2 'Land at Lane End Farm' identifies this site off Tunnel Road as having the potential to provide approximately 0.7ha of employment land.

- 17.24 Furthermore, planning permission was granted in January 2017 for the redevelopment of the Clipper Teas site in Beaminster (Ref: WD/D/16/000654). Full planning permission was granted for the erection of a factory extension for Clipper Teas to consolidate their existing production, storage and distribution at the south site. Outline permission was also granted for the demolition of the existing building on the central and north sites and the development of up to 45 homes.

Summary

- 17.25 In summary, the health check assessment has demonstrated that overall, Beaminster is a vital and viable centre. In our view the centre's key strengths and weaknesses include the following:

- The centre is a traditional market town (although it does not have a street market), which benefits from a distinctive character and well-kept buildings.
- The centre has a very good convenience provision, which is anchored by a Co-op store and is supported by a number of independent businesses.
- Beaminster's comparison provision caters well for its local population.
- Whilst the town has an adequate retail service offer, improvements to its leisure offer are recommended in order to attract more visitors to the centre.
- Although the financial service offer of the town is in line with national averages, Beaminster does not have a high street bank. Banks are important to the overall vitality and viability of centres, particularly smaller centres, as they help generate day-to-day trips and linked expenditure.
- Beaminster has one vacant unit, which is equivalent to a vacancy rate of 2.6%. This is a positive indicator that the town centre is performing well and is a viable shopping location.
- The town is characterised by a large number of independent businesses, which help to create a diverse and distinctive shopping environment.
- It is considered that the town centre's accessibility is adequate. Whilst vehicular accessibility is considered good, we recommend improvements in public transport, along with pedestrian accessibility improvements to increase road safety.
- There are a number of opportunities for new development in Beaminster although these are unlikely to contain town centre uses; sites include land to the north of Broadwindsor Road, land at Lane End Farm, and the Clipper Tea site on Broadwindsor Road.

18 POUNDBURY HEALTH CHECK

- 18.1 Poundbury is an urban extension situated on the outskirts of Dorchester, on land owned by the Duchy of Cornwall and built according to the architectural principles advocated by The Prince of Wales. The construction of Poundbury commenced in 1993 and is being built in four distinct phases, with outline permission being granted in December 2011 for the final phase with a view for completion in 2025.
- 18.2 Poundbury is described as being a high density urban quarter which gives priority to people, rather than cars, and where commercial buildings are mixed within residential areas, shops and leisure services, in order to facilitate a walkable community and a shared space. It also challenges the principles of zoned development, with integrated affordable housing (35%) and private housing. According to the Duchy of Cornwall Poundbury Factsheet, as of June 2017, Poundbury was home to 3,000 people with around 2,000 people working in 185 businesses. Dorset Cereals and House of Dorchester (chocolatiers) are located in Poundbury.
- 18.3 The development is comprised of four phases, with phases 3 and 4 still yet to be completed. These phases include:
- **Phase 1:** This phase comprised 196 houses and 56 flats, including 55 affordable housing units. Pummery Square was designed to be the 'hub' of the first phase. Brownsword Hall is the main feature of the square and the hall which is often used for events. Other services built in this phase include a village store, public house, clinic and a number of small retail units.
 - **Phase 2:** The second phase provided 900 dwellings and 6 hectares of employment space. The focus of Phase 2 was 'Queen Mother Square', which is recognised as being the 'central hub' of Poundbury. In 2010, construction on the west side of the square took place which comprised a Waitrose store, 1,858sqm (20,000 sq.ft) of office and apartment space, and additional retail and restaurant floorspace. There is also a large public house and retirement living apartments. The final building, the Royal Pavilion, comprising 20 luxury apartments will be completed in 2018.
 - **Phases 3 & 4:** Outline permission was granted in 2011 for the completion of Poundbury with development spanning 44 hectares. This will comprise the development of 1,200 dwellings, employment floorspace and a school.
- 18.4 Poundbury is not defined within the hierarchy in the 2015 Local Plan and instead is described as an 'urban extension' to Dorchester. As a result there is no defined PSA or defined frontages. The *West Dorset, Weymouth & Portland Initial Issues and Options Consultation Paper* (February 2017) suggests that Queen Mother Square at Poundbury should be defined as a 'district centre', where the concentration of facilities will meet the daily needs of the Poundbury population. The *Poundbury SPD* (2006) also sets out that there will be a number of small neighbourhood centres which will comprise a mix of shops and services. This includes the area around Buttercross and Pummery Square.
- 18.5 As it stands, in contrast to other centres, Poundbury does not have a single area where retail and town centre uses are concentrated due to the architectural principles of the scheme. Although the area around Queen Mother Square is anchored by Waitrose, a public house, garden centre and café, there are similar areas where town centre uses are concentrated such as the Buttercross to the south. This audit will therefore cover the entire of Poundbury rather than just the proposed district centre.
- 18.6 It should be noted that Poundbury is still being developed with around 1,000 dwellings still to be constructed. As such it is expected that town centre uses will expand alongside the remaining residential areas.

Retail Composition & Diversity of Uses

- 18.7 The table below summarises the centre's retail and service mix, and diversity of uses based on the total outlets recorded in the Council's 2016 audit of the centre.

Table 18.1: Current Retail and Service Offer – Units

Category	Number of Outlets	% of Total Outlets	UK (%)
Comparison	26	22.8%	31.1%
Convenience	8	7.0%	8.8%
Retail Service	10	8.8%	14.4%
Leisure Service	12	10.5%	23.9%
Financial & Business Service	40	35.1%	10.3%
Vacant Retail & Service Outlets	18	15.8%	11.2%
TOTAL:	114	100.0%	100.0%

Source: West Dorset District Council (2016). Figures may not sum due to rounding.

- 18.8 Please note that there is no data available regarding retail and service use floorspace in Poundbury.

Convenience Offer

- 18.9 There are just 8 convenience units in the survey area according to the Council's 2016 audit. This represents only 7.0% of total units which is below the national average of 8.8%.
- 18.10 Convenience provision includes two supermarkets, two bakers and confectioners, one convenience store, one butchers, one off license and one grocers and delicatessens. As described above, the main supermarket in Poundbury is Waitrose on Queen Mother Square, which includes an in-store bakery and café. Within the West Dorset district area, Poundbury is achieving a market share of 1.3%. The majority of this total market share is captured from zone 5 (5.0%) which covers the main centres of Dorchester and Poundbury as well as zones 3 (1.7%) and 7 (3.6%).
- 18.11 The dispersed nature of retail units in Poundbury means that there are a number of smaller convenience stores located some way away from one another, mainly in smaller neighbourhood parades.
- 18.12 In summary we consider that there is potential for Poundbury to increase the range and quality of its food and independent convenience offer (including, for example, a greengrocers and fishmongers), concentrated around Queen Mother Square to help create an attractive, sustainable and commercially viable district centre offer.

Comparison Offer

- 18.13 There are 26 comparison goods retailers located across Poundbury. This represents just 22.8% of units which is significantly below the national average of 31.1%. The range of goods sold across the centre is limited. It includes art, women's clothing, flowers, textiles and soft furnishings, toys and games, furniture, sports and leisure goods and crafts/gifts. There are a number of bridal stores in the centre, but no menswear shops. The non-food retail units across the centre are mainly small in size and provide specialist goods which attract visitors from outside of Poundbury. As for its convenience goods offer, we consider there is potential to increase the non-food offer in Poundbury, principally focussed on Queen Mother Square.

Service Offer

- 18.14 There are 88 service outlets in Poundbury which account for 62.8% of all units and this is significantly above the (Experian Goad) national average of 48.6%. The following provides a brief summary of provision in the different service categories:
- There are 10 **retail services**, which represents 7.1% of total outlets. This is below the national average of 14.4%. Retail service provision comprises 5 health and beauty outlets, 2 repairs, alterations and restoration services, 2 travel agents and a photo studio. There is also a post office located inside a convenience store known as Buttermarket Stores situated to the south of the centre. There are no dry cleaners/laundrettes or opticians.
 - There is a disproportionate number of **financial and business services** in Poundbury. The 40 services account for approximately 35.1% of units, which is significantly above the national average of 10.3%. There is a large concentration of property and financial services across Poundbury, namely estate agents and accountancy firms. There are no retail banks in the centre although this is expected given the size and role of the centre.
 - The 12 **leisure service** outlets represent 8.6% of total units, which is below the national average of 23.9%. Leisure provision comprises 9 cafes, a sport and leisure facility (Poundbury Pilates Studio) and 2 public houses, one of which had not opened at the time of the survey taking place. Given Poundbury's location on the outskirts of Dorchester and the walkable nature of the centre, additional leisure provision, particularly in the way of restaurants to enhance the evening economy could be beneficial and should be concentrated in and around the defined district centre in our view to help underpin its vitality and viability.
- 18.15 There is a clear imbalance between the over-provision of financial services in Poundbury, and the under-provision of retail and leisure services. We consider that leisure services, particularly food and beverage uses, would be an important addition to the centre, particularly focussed on Queen Mother Square, and would help to retain residents within the centre during the evening and create greater activity and vibrancy throughout the day.

Vacancies

- 18.16 There were 18 vacant units recorded by the Council in 2016. This is equivalent to 12.9% which is above the national average of 11.2%. Although this vacancy rate is high, it is important to note that the development of Poundbury is not yet complete, with new units continually being added to the stock.

Multiple and Independent Retail Representation

- 18.17 There are just two multiple retailers occupying units in Poundbury; namely Waitrose and Budgens. The remaining comparison and convenience stores and services are operated by independent retailers. Given Poundbury is not currently defined in the retail hierarchy and its main role and function is to meet the needs of local residents, the lack of non-food multiple retailers is not unexpected.

Markets

- 18.18 Although there is no regular street market in Poundbury, a farmer's market takes place on the first Saturday of each month in Queen Mother Square between 9am and 1pm. We consider that there will be significant potential to expand this market over different days of the month and weeks in the future to help create a more diverse and attractive offer in this location, and attract a wider customer catchment and profile.

Retailer Demand & Prime Zone A Rents

- 18.19 There are no retailer requirements listed for Poundbury and we have not been able to ascertain market evidence on Prime Zone A rents.

Environmental Quality

- 18.20 The environmental quality of Poundbury is unique. The architectural style of the buildings draws on Dorchester's heritage, using local materials including stone, slate and render. Place making has been key to the design of Poundbury, with an emphasis placed on urban design, landscaping, signage and street furniture.
- 18.21 Building styles, though all traditional, vary from rows of terraced houses to small and large standalone buildings. Buildings of importance include Stathmore House situated in the centre of Queen Mother Square, which is recognised as being similar in design to Buckingham Palace.
- 18.22 The streets are interspersed with many small squares, some with large areas of soft landscaping, providing space for residents to gather and for community events, the most important of these being Queen Mother Square which sits in the highest position in Poundbury.
- 18.23 Much attention is given to the provision of appropriate street furniture and planting to enhance the streetscape. There are trees planted across the centre, including along footpaths and in the public squares and there is an abundance of public seating available. In some areas planting beds separate the footpaths, roads and the buildings. Public artwork and statues including the Queen Mother statue in the main square add further interest to the public realm.
- 18.24 There are many areas of green space across the centre. There are a number of 'village greens' and squares as well as 'The Great Field' used as a recreational space by both Poundbury residents and those living on the adjoining areas of Dorchester.
- 18.25 There was no evidence of litter or vandalism at the time of our site visits.

Accessibility

- 18.26 Poundbury is linked to central Dorchester by both Bridport Road and Damers Road. It is a thirty minute walk to Dorchester town centre, or around a five minute drive. Regular bus services, including two electric buses, operate to Dorchester. Both railway stations in Dorchester are situated around 1.6 miles away.
- 18.27 Parking is free across Poundbury with the main car park being located at Queen Mother Square.
- 18.28 The masterplan for Poundbury was based around placing the pedestrian at the centre of the design, rather than the car. To support this design principle, homes, shops and offices have all been built amongst one another to encourage walking.
- 18.29 There are no road markings, pedestrian crossings, signage or traffic lights. Along with irregular road patterns and shared spaces, the design aims to constrain the speed of vehicles and encourage safe driving throughout Poundbury. The majority of homes have parking provided in courtyards to the rear rather than the front of homes, to create parking-free streetscapes.

- 18.30 As part of phases 3 and 4 of development, a perimeter walkway and cycleway is proposed. A pedestrian and cycle route is proposed around the entire edge of the development to provide a sustainable link between the various neighbourhoods.
- 18.31 During our site visit, we noted that the highest footfall was around the proposed district centre of Queen Mother Square, particularly to the front of the Waitrose store. There was also a fairly high pedestrian flow at Pummery Square, where Budgens/Poundbury Village Stores is located. However, overall there was a distinctively low level of pedestrian activity across the entire centre. A relatively high number of cars were parked on streets and in the car parks. Although Poundbury is intended to be designed to encourage walking, for those travelling to or from Dorchester or to areas in Poundbury some distance from their homes, due to the ease of driving it is often still the preferred method of transportation.

New Investment & Potential Development

- 18.32 Phases 3 and 4 of Poundbury are not yet completed and still remain under construction. An application (Ref: 1/D/09/001363) for outline planning permission was approved in December 2011 for the final two phases which comprised the erection of 1,200 dwellings, a new 450 children primary school 25,000 sqm of non-residential development and associated roads, drainage and other infrastructure.
- 18.33 In September 2012 a reserved matters application (Ref: 1/D/12/000082) was approved for the erection of 505 dwellings, 6,254 sqm of commercial floorspace together with associated garages, roads, accesses and open space for the area known as the 'North-East Quadrant'. This will stretch from Queen Mother Square at the heart of Poundbury to the Poundbury Hilfort in the northeast.

Summary

- 18.34 In summary, Poundbury differs to the other centres located within the three local authority areas due to its unique design and character, the planned dispersal of town centre uses, the newly formed district centre at Queen Mother Square and its ongoing development. Although its offer is skewed by the high number of financial and business services and it is under performing in a number of categories, we do consider that overall it is a vital and viable centre. In our view the key strengths and weaknesses of the centre include the following:
- Poundbury's environment quality including traditional architecture, streetscape and public squares is of the highest quality.
 - It benefits from a distinctive 'walkable' environment where pedestrians are prioritised over cars.
 - Its food and convenience offer is anchored by a Waitrose supermarket located in the main square, which attracts local residents from Poundbury and Dorchester.
 - There is potential to provide small food and convenience goods stores in the defined district centre, focussed on Queen Mother Square, to help underpin its vitality and viability. Attracting retailers including local butchers, greengrocers and fishmongers would complement Waitrose and would be in keeping with the traditional nature of Poundbury.
 - Although the comparison goods offer is below the national average, the specialist nature of the goods sold and the independent retailers operating here is typical of district and neighbourhood centres and meets the daily needs of local residents.
 - Poundbury benefits from a post office as well as a number of health and beauty outlets.

- There is a very high number of financial and professional services in Poundbury. This demonstrates the role Poundbury has had in providing employment space for the district. Despite this large proportion of services, there are no retail banks in the centre.
- There is potential to increase the food and beverage offer in Poundbury, principally focussed on Queen Mother Square, to help underpin its daytime and evening economy.

18.35 In summary, we consider that there is potential to co-locate and concentrate new retail and service businesses in the defined district centre at Queen Mother Square in order to create a commercially viable and sustainable shopping location that meets the day-to-day and weekly shopping and service needs of Poundbury's residents. The district centre would be complemented by Poundbury's mix of smaller neighbourhood shopping parades.

19 QUANTITATIVE RETAIL NEEDS ASSESSMENT

- 19.1 This section sets out the results of the quantitative retail need ('capacity') assessment for new retail (comparison and convenience goods) floorspace in the three local authority areas covering the period from 2017 to 2036; further broken down into five year periods (i.e. 2021, 2026, 2031). Data is also provided for 2033 to inform the North Dorset Local Plan Review. This assessment updates and supersedes the findings of the Council's previous evidence-based studies.

The CREAT^e Model: Key Baseline Assumptions & Forecasts

- 19.2 The CREAT^e economic model has been specifically designed and developed by Carter Jonas over a number of years to assess the capacity for and impact of new retail (convenience and comparison goods) development and investment.
- 19.3 The (Excel-based) model adopts a transparent '*step-by-step*' approach in which all the key assumptions and forecasts can be easily tested, in accordance with good practice guidance. The model is underpinned by the survey-derived market share analysis, which helps to inform the assessment of the current (convenience and comparison goods) turnovers and trading performance of existing centres, shops and stores at the base year.
- 19.4 It has been assumed for the purpose of the capacity assessment that the local retail markets in the three local authority areas are in '*equilibrium*' at the base year. In other words all existing centres and stores are broadly assumed to be trading in line with their expected ('benchmark') turnover levels at the base year. This approach is reasonable, robust and realistic in this case as it reflects the impact of the economic downturn and the significant growth in internet sales on the trading levels and performance of retailers and stores across the UK. It also reflects the potential impact of Brexit on the economy and retail sector going forward. Further to this, there is no qualitative evidence from the health check assessments to clearly show that any of the main centres and stores in the local authority areas are significantly over-trading or under-trading at the base year (2017).
- 19.5 On this basis any residual expenditure available to support new retail floorspace over the development plan periods will be derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels (based on population and expenditure growth), and the constrained growth in 'benchmark' turnovers²⁹ based on applying robust year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace³⁰.
- 19.6 It is important to restate that long-term forecasts should be treated with caution, as they will be influenced by changes in economic, demographic and market trends. As a result we advise that greater weight should be placed on the short term forecasts carried out over a five year period (see PPG, para 003). Notwithstanding this, the Councils will need to take account of the forecast capacity for new retail floorspace over their plan

²⁹ In this case, under the 'equilibrium' approach, the 'benchmark' turnovers at the base year (2017) are assumed to be the 'current' turnovers derived from the market share analysis.

³⁰ The 'efficiency' growth rates are informed by Experian's latest *Retail Planner Briefing Note* (Figures 4a and 4b). These year-on-year turnover growth rates help to maintain the viability and vitality of existing centres and stores over time, particularly against the backdrop of increasing occupancy costs (e.g. rents, business rates, service charges, etc.) and labour costs. It should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'efficiency' growth depending on a range of trading factors (including the size, quality and type of retail floorspace). In this case we have assumed slightly higher turnover 'efficiency' growth levels for existing and committed floorspace in the local authority areas for the period 2025-2036 than forecast by Experian (see Section 3 of this study for a more detailed explanation).

periods to inform their policy making and site allocations, as the NPPF (paragraph 23) states that local planning authorities should meet the need for retail and town centre uses 'in full' (see Section 2 of this study).

- 19.7 The updated capacity forecasts set out in this section are intended as a broad guide to enable the Councils to assess the broad strategic options for the spatial distribution of new retail-led floorspace and development over their plan periods, and to make informed policy choices about where any forecast need should be met, in accordance with the advice set out in the NPPF (paragraph 24). It follows that the allocation of sites to meet any identified need over the next five years, and over the lifetime of the development plans, will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres, and the potential to expand existing centres to accommodate the forecast needs.
- 19.8 The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the CREATE Model are described in more detail below.

Base Year Population and Projections

- 19.9 The 2017 ('base year') population estimates and projections (to 2021, 2026, 2031, 2033 and 2036) for the study area and zones have been informed by two different data sources.
- **Experian Business Strategies (EBS):** Table 1 (**Appendix 2**) shows the base year and projected population figures sourced directly from the *Retail Planner Reports* ('RPR') using CJ's in-house Experian MMG3 Geographic Information System (MMG3 GIS). As the footnote to the table explains, the population figures are based on the latest ONS Sub-National Population Projections. They do not take account of the impact of local housing-led policy allocations on potential population growth.
 - **Dorset Councils Partnership (DCP):** Table 2 (**Appendix 2**) shows the 2015 mid-year Ward based population estimates and projections sourced from DCP for the 12 study zones. These population figures do take account of local housing-led policy allocations. However it should be noted that some of the study area zones extend beyond the three local authority areas (i.e. Zones 4, 6, 9, 10 and 11). As a result, the Councils' base year population estimates and projections do not provide complete coverage for the whole study area.
- 19.10 Drawing on these two population sources, Table 3 (**Appendix 2**) sets out our preferred ('*composite*') base year population estimates and projections. For zones 1, 2, 3, 5, 7, 8 and 12 the population figures have been sourced directly from the DCP ward-based projections. For Zones 4, 6, 9, 10 and 11 the base year populations have been sourced directly from EBS, as these zones extend beyo
- 19.11 nd the defined local authority areas. The forecast population growth for each of these zones (i.e. 4, 6, 9, 10 and 11) draw on the DCP projections (for those parts of the zone that lie within the local authority areas and are covered by the Ward-based forecasts) and on the EBS projections (for the residual population that is located outside of the wards in neighbouring local authority areas).
- 19.12 The '*composite*' base year population and projections shown in Table 3 (**Appendix 2**) therefore represent a best estimate at this stage as to the likely scale and location of new growth across the study area, the respective local authority areas and constituent zones based on the EBS and DCP projections. As the table shows, the study area population (Zones 1-12) is forecast to increase by +15.1% (+41,317 people) between 2017 and 2036; from 273,820 to 322,741. This is significantly higher than the EBS-based growth forecast of +6% (+16,437 people) over the same period; from 272,453 to 291,370.
- 19.13 In our judgement the '*composite*' population growth forecasts could therefore represent a '**high growth**' scenario for each local authority area. As a result the capacity forecasts may overstate the need for new retail floorspace in each local authority area. We therefore advise that the capacity forecasts should be subject to

reviewed by each Council as and when the local ward-based (housing-led) population projections are revised and updated.

Base Year Expenditure Per Capita and Forecasts

- 19.14 Tables 1 and 3 set out the expenditure per capita estimates for convenience goods (**Appendix 3**) and comparison goods (**Appendix 4**) for each of the study zones; after making an allowance for special forms of trading (SFT)³¹.
- 19.15 The base year (2017) average expenditure per capita figures have been derived from our in-house Experian MMG3 GIS (please note all expenditure and turnover figures are expressed in 2015 prices).
- 19.16 The expenditure per capita figures by zone have been grown year-on-year based on the latest Experian *Retail Planner Briefing Note 15* (RPBN) published in December 2017. As described in Section 3, Experian forecast more limited year-on-year growth in convenience and comparison goods expenditure than previous forecasts.
- 19.17 Our allowance for SFT at the local level has been informed by the results of the household survey, benchmarked against Experian's SFT market share forecasts for convenience and comparison goods. The survey-derived shares have necessarily been adjusted downwards to reflect the fact that a proportion of online food and non-food sales are sourced from traditional stores rather than from dedicated ('dotcom') warehouses³². This is in compliance with the advice set out in Experian's latest RPBN. The adjusted SFT market share for comparison goods is 16.5% in 2017, which is above the Experian national average figure of 13.8%. In contrast the locally adjusted SFT market share for convenience goods of 1.2% is below the national average of 3.2%.
- 19.18 Clearly if the growth in SFT (online shopping) is higher in the study area than the national projections, then this would effectively reduce the total available expenditure to support existing and new floorspace over the forecast period.

Total Available Expenditure

- 19.19 Tables 2 and 4 forecast the growth in total available convenience goods (**Appendix 3**) and comparison goods (**Appendix 4**) retail expenditure respectively across the study area and zones between 2017 and 2036 (excluding SFT)³³.
- 19.20 The tables shows that total convenience goods expenditure is forecast to increase by +17.8% (+£111.2m) for the study area as a whole; from £625.8m in 2017 to £737m by 2036. Total comparison goods expenditure growth is forecast to be significantly higher, +99.3% (+£883.2m); from £889.7m to £1,772.9m.
- 19.21 For those zones that broadly make up the three different local authority areas, the total forecast expenditure growth is as follows:

³¹ SFT comprises non-store sales via the internet, mail order, stalls and markets, door-to-door and telephone sales.

³² Drawing on Experian's latest research we have assumed that some 25% of SFT convenience goods sales and 70% of comparison goods sales are sourced from traditional ('physical') retail space.

³³ Total expenditure is derived by multiplying the population and average expenditure per capita levels together

- **Weymouth & Portland Borough Council** (broadly equivalent to zones 1-2): forecast a +17.8% (+£23.4m) growth in total convenience goods expenditure, and +99.7% growth (+£172.1m) in comparison goods spend.
- **West Dorset District Council** (broadly equivalent to zones 3-9): a +17% (+£53.4m) forecast growth in total convenience goods expenditure, and +98.1% growth (+£444.7m) in comparison goods spend.
- **North Dorset District Council** (broadly equivalent to zones 10-12): a +19% (+£34.4m) forecast growth in total convenience goods expenditure, and +101% growth (+£266.4m) in comparison goods spend

19.22 The growth in comparison goods expenditure significantly outstrips convenience goods spend over the study period. This effectively means that there should be greater capacity potential for new comparison goods floorspace than for convenience goods retailing; although this will be dependent on the level of retail commitments in the pipeline and the forecast growth in the 'productivity' levels of existing floorspace and stores.

Market Share Analysis (excluding SFT)

19.23 **Section 4** described the headline results of the survey-derived (%) market share analysis, including SFT. For the purpose of the retail capacity assessment, and in line with accepted approaches, the market share analysis has been adjusted for both convenience goods (**Table 1, Appendix 10**) and comparison goods (**Table 1, Appendix 11**) to exclude SFT³⁴.

19.24 The next key stage in the capacity assessment involves allocating the baseline convenience and comparison expenditure (£ million) within the study area and zones to the identified centres, stores and floorspace based on the survey-derived market shares. This helps to establish the current '*baseline*' (2017) trading performance for the main centres and stores across the three local authority areas based on expenditure drawn from the Study Area only. It should be noted that no allowance is made at this stage for any potential 'inflow' (trade draw) of expenditure to centres and stores from outside the defined study area.

19.25 For both convenience goods (**Appendix 10**) and comparison goods (**Appendix 11**) the 'baseline' turnovers are projected forward to 2021 (Table 3), 2026 (Table 4), 2031 (Table 5), 2033 (Table 6) and 2036 (Table 7) assuming no changes in market shares. This '*constant market share approach*' is standard practice for retail capacity and impact assessments. However, the Council will be aware that it is a highly theoretical approach as it does not, for example, take account of the potential impact that new retail investment and development (both within and outside the Council area) can have on existing shopping patterns, market shares and turnovers over time.

'Inflow' (Trade Draw) from outside Study Area

19.26 In order to provide a complete picture of the current trading (turnover) performance of the main centres and stores across the three local authority areas we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the widely defined study area. The 'inflow' assumptions take account of:

- the scale, offer and location of all existing centres and stores in the respective local authority areas;

³⁴ This is in accordance with the standard approach for retail assessments, which make a deduction for SFT at the outset from the expenditure per capita figures.

- the likely extent of their catchment areas;
- the competition from centres, stores and shopping facilities outside the study area; and
- the likely retail expenditure derived from people who live outside the study area (including tourists, visitors and commuters) in the study area's main centres and stores.

19.27 We have also taken account of previous studies³⁵ and retail assessments to help inform our judgements.

19.28 Although the assessment of 'inflow' is not a straightforward exercise, due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume that for comparison goods retailing the study area's larger centres will draw a proportion of their shoppers and trade from outside the defined study area.

19.29 On the other hand the local centres and smaller villages will generally draw the majority of their shoppers and trade from within their more localised catchments, with limited or no 'inflow' from outside the study area.

19.30 The 'inflow' of convenience goods expenditure to the main centres and stores from outside the wider study area will also be more limited than for comparison goods, as households generally carry out their main food shop at their more local and convenient stores, and do not generally travel longer distances for food purchases.

Total Turnover of Centres and Stores

19.31 The assessment of the total turnover of all the main centres and stores within the three local authority areas is based on the expenditure allocated to these centres/stores according to their survey-derived market shares at 2017, and our judgements as to the total "*inflow*" of trade to these centres/stores from outside the defined study area. The detailed (convenience and comparison) goods turnovers are appended to this report as follows:

- For **West Dorset**, the base year and predicted turnovers of the main centres/stores are set out in Table 1 (Appendix 12) for convenience goods, and Table 1 (Appendix 13) for comparison goods.
- For **Weymouth and Portland**, the turnover forecasts for 2017 to 2036 are provided in Table 1 (Appendix 14) for convenience goods, and Table 1 (Appendix 15) for comparison goods.
- For **North Dorset**, the total turnover estimates for all its main centres/stores are set out in Table 1 (Appendix 16) for convenience goods, and Table 1 (Appendix 17) for comparison goods.

Retail Floorspace Commitments/Allocations

19.32 The next stage in the retail capacity assessment takes into account the retail floorspace and predicted turnovers of all the major food and non-food commitments³⁶ and policy-led floorspace allocations in the three local authority areas at the time of preparing this study.

19.33 Based on information provided for the West Dorset council area we understand that the major planned/committed retail schemes are as follows. Table 2 in Appendix 12-13 sets out the predicted convenience and comparison goods turnovers of the permitted retail floorspace based on the available evidence, including Mintel's latest UK Retail Rankings Report):

³⁵ Joint Retail Assessment (for Christchurch Borough Council, East Dorset District Council, North Dorset District Council and Purbeck District Council), March 2008 and update dated 2010 and West Dorset Council, Weymouth and Portland Borough Council (December 2008)

³⁶ Commitments are commonly defined as retail floorspace with planning permission and/or under construction at the time of preparing this study.

- **Bradford Abbas (planning ref: WD/D/16/000486):** permission on land adjacent to Unit 4, Peel Centre (Babylon Hill) for an unrestricted Class A1 non-food retail warehouse unit with a total floorspace of 2,230 sqm gross, and a car park extension. It is assumed that the total sales area will be 1,895 sqm net, of which up to 30% (569 sqm net) will be for ancillary food sales and the residual will comprise 1,326 sqm net for comparison goods.
- **Chickerell (WD/D/16/001603):** permission for a new Class A1 Aldi store (1,804 sqm gross/1,254 sqm net) at Chickerell Link Road, with associated access, car parking and landscaping. The outline application also allows for up to 500 sqm of Use Class A1-A5 floorspace on land to the north of the Aldi. It is assumed that circa 70% (878 sqm net) of the store's sales area will be for food and convenience sales and 30% for comparison retail. In addition it is assumed that some 50sqm net of the other Class A1-A5 space will be for convenience sales and circa 150 sqm net for comparison goods retail.
- **Chickerell (WD/D/16/002733):** permission for the part demolition of and extension to the existing petrol filling station/car workshop/retail unit at Charlestown Garage, Chickerell Road for a new convenience retail store (Class A1), a second retail unit (Class A1) and a takeaway (Class A5) together with the provision of car parking, a service area and associated development (revised scheme to application WD/D/16/0829). For the purpose of the retail capacity assessment it has been assumed that the convenience store will extend to some 279 sqm net and Unit 2 will have a comparison sales area of 102sqm net.

19.34 The major planned/committed retail development schemes in the Weymouth & Portland Council area are as follows (also see Table 2, Appendix 14-15):

- **Weymouth (WP/14/01064/FUL):** Full planning permission for alterations and conversion of existing Brewers Quay building at Hope Square to provide a museum; wet weather/exhibition space and cultural experience space; 4 Class A1/A3 units; 35 Class C3 residential units and other associated works. For the purpose of this assessment it has been assumed that up to half of the A1 space will be for comparison goods retail (equivalent to a net sales area of 125 sqm).
- **Weymouth (WP/12/00907/OUT):** permission for the demolition of existing derelict farm buildings off Chickerell Road, Curtis Fields to provide a Class A1 convenience store of circa 372 sqm with 7 flats above the store; a Class B1 commercial unit (office circa 196sqm) with 12 flats over; and 64 residential dwelling units (Outline). The permission also allows for provision of new vehicular and pedestrian access.
- **Fortuneswell, Portland (WP/15/00638/FUL):** permission for change of use for Royal Victoria Lodge, Victoria Square, from Class A4 (drinking establishment) to Class A1 (retail shop) on ground floor and to include an external ATM, external refrigeration and air conditioning plant area and 5 apartments at first floor. It is assumed that the permitted scheme will include a 328 sqm (net) convenience store.

19.35 The major planned/committed retail development schemes in the North Dorset Council area are as follows (also see Table 2, Appendix 14-15):

- **Blandford Forum (2/2016/0325/FUL):** the out-of-centre Class A1 Lidl store at Shaftesbury Lane with associated car parking, landscaping, and access arrangements opened in September 2017. It has been assumed that 1,114 sqm net is for convenience goods sales and up to 575 sqm is for comparison goods retail.
- **Gillingham (2/2014/1590/FUL):** Extension to existing Orchard Park Garden Centre at Shaftesbury, to allow for covered and open outdoor sales areas, with additional parking areas and new pedestrian access. It is assumed that the extension will provide circa 2,392 sqm net of new comparison goods floorspace.

CREATe Capacity Forecasts – Approach

- 19.36 In order to robustly assess the potential capacity for new **convenience goods** floorspace up to 2036 we have necessarily tested two trading scenarios for different types and formats of food/convenience retailing in order to convert the residual expenditure (after taking account of new commitments) into a (net) sales area figure:
- **‘Superstore format’ trading scenario** – we have first assumed that the residual expenditure could support one of the ‘top 6’ foodstore operators (i.e. Tesco, Sainsbury’s, Asda, Morrisons, Waitrose and Marks & Spencer), which together could achieve an average sales density of approximately £12,000 per sqm in 2017 (2015 prices) based on the latest Mintel UK Retail Rankings; and
 - **‘Supermarket/discounter’ trading scenario** – we have also tested the impact on the capacity forecasts of assuming the residual expenditure is taken up by a supermarket (e.g. Co-op, Budgens, etc.) and/or ‘discount’ retailer (principally Aldi and Lidl) trading at a slightly lower average sales levels of circa £7,500 per sqm in 2017. However, it should be noted that both Aldi and Lidl have increased their company average sales densities significantly over recent years due to their expansive store opening programmes and their increasing market share of the grocery sector. If this trend continues then we consider that the gap between the ‘top 6’ grocers and the main discounters will narrow further over time.
- 19.37 For **comparison goods** it is assumed that new floorspace will achieve an average sales levels of circa £6,000 per sqm in 2017³⁷.
- 19.38 As stated previously, it has been assumed that the local retail market is in ‘equilibrium’ at the base year, as there is no qualitative evidence to show that existing stores/floorspace at the local level are significantly over and/or under trading.
- 19.39 Finally, and in accordance with good practice, it has also been assumed that the baseline average sales levels for all new and existing convenience and comparison goods floorspace will experience a year-on-year growth in turnover ‘efficiency’ (floorspace ‘productivity’) levels in line with the latest forecasts set out in Experian’s *Retail Planner Briefing Note 15* (Figures 4a and 4b).

West Dorset – Capacity Forecasts

- 19.40 The following sets out the convenience and comparison goods capacity forecasts for the main centres and stores in the West Dorset local authority area based on the above analysis of population, expenditure and turnover growth over the forecast period, and the predicted trading performance of all known retail commitments. The detailed capacity tabulations for convenience and comparison goods are set out in Appendix 12 and 13 respectively.

Convenience Capacity

- 19.41 Table 3 (Appendix 12) sets out the total residual capacity for new convenience goods floorspace in the West Dorset local authority area after allowing for the turnover of all known commitments. Tables 4-10 disaggregate this total capacity for the main centres (i.e. Dorchester, Bridport, Lyme Regis, Sherborne and Beaminster), the small local centres and villages, and the District’s out-of-centre retail floorspace.

³⁷ The average sales density of circa £6,000 per sqm at 2017 is assumed to be broadly equivalent to the average sales performance of retail units in prime shopping locations, and has been informed by different research evidence including the latest Mintel UK Retail Rankings Report. However, average turnover levels do inevitably vary between different locations, different retail formats and different operators. Where this is the case it will have implications for assessing the capacity for, and impact of new retail floorspace. The Councils will therefore need to take this into account when considering applications for different operators and different types of retail floorspace in edge and out of centre locations. For example ‘bulky goods’ DIY retail warehouse operators typically trade at lower average sales levels, whereas electrical goods retailers and some fashion operators can achieve much high average turnover levels.

- 19.42 The table below summarises the convenience goods capacity forecasts in Tables 4-10 (Appendix 12) for new 'superstore format' floorspace:

Table 19.1: West Dorset DC: Convenience Goods Capacity (Net) by Locations – New Superstore Format (sqm)

	2021	2026	2031	2033	2036
Dorchester	209	365	391	461	570
Bridport	46	97	122	143	175
Lyme Regis	17	38	48	56	68
Sherborne	23	34	37	44	54
Beaminster	12	16	19	23	28
All smaller villages/local centres	76	140	155	181	221
All Out-of-Centre	-795	-365	-245	-55	239
TOTAL WEST DORSET LPA - CONVENIENCE GOODS CAPACITY	-411	325	527	852	1,354

- 19.43 The forecasts show no capacity for new convenience goods floorspace in the District between 2017 and 2021 after taking account of all known commitments. The District-wide capacity increases thereafter to 325 sqm net in 2026 (which could support one small convenience store); 527 sqm net in 2031 (up to two convenience stores); 852 sqm net by 2033 (either circa three convenience stores, or a small store format); and 1,354 sqm net by 2036 (which could support circa 4 convenience stores, or a smaller superstore format).
- 19.44 For the main centres in the District, the majority of the capacity is forecast for Dorchester (365 sqm net in 2026, increasing to 570 sqm net by 2036)³⁸.
- 19.45 There is limited capacity for new convenience goods floorspace in the District's other main centres and smaller local centres/villages. This need could potentially be met through new small convenience store provision in these centres, or the extension of existing stores where possible.

The District's existing out-of-centre foodstores only generate capacity at the end of the forecast period; 239 sqm net by 2036. This need should be directed to town centre and edge of centre locations first, in accordance with the sequential approach set out in the NPPF. If no suitable sites are available in existing centres, then the forecast need could be met through the extension of existing out-of-centre stores (where possible), provided that the new floorspace satisfies the impact test (NPPF; paragraphs 26-27).

- 19.46 Turning to the forecast capacity for new 'supermarket/discounter format' floorspace, the summary table below shows no District-wide need over the short term (2017 to 2021). There is increasing capacity for 1,364 sqm net by 2033 (which would support one additional Aldi or Lidl store) and 2,167 sqm net by 2036 (which could possibly support up to two Aldi or Lidl stores).

Table 19.2: West Dorset DC: Convenience Goods Capacity (Net) by Locations – New Supermarket / Discounter Format (sqm)

³⁸ By way of comparison the 2008 Joint Retail Assessment (for West Dorset District Council and Weymouth & Portland Borough Council) identified capacity for Dorchester of 314 sqm net by 2026.

	2021	2026	2031	2033	2036
Dorchester	335	584	625	738	911
Bridport	74	156	195	229	280
Lyme Regis	28	60	76	89	109
Sherborne	37	55	59	70	86
Beaminster	19	26	31	36	45
All smaller villages/local centres	121	224	248	290	354
All Out-of-Centre	-1,272	-584	-393	-88	382
TOTAL WEST DORSET LPA - CONVENIENCE GOODS CAPACITY	-658	521	843	1,364	2,167

19.47 The 'bulk' of this capacity is forecast for Dorchester. The need for 911 sqm net of new floorspace by 2036 could probably support one 'supermarket/discount' operator. In our view a suitable site would need to be identified in or on the edge of the town centre to accommodate the need forecast towards the end of the plan period. Depending on the location of this site (i.e. town centre versus edge-of-centre) it may be necessary to provide some parking spaces to serve a potential new foodstore.

19.48 The predicted capacity for the other main centres, local centres/villages and out-of-centre is more limited. As for 'superstore format' floorspace, this level of floorspace capacity could probably be accommodated within the District's existing centres by way of change of use or infill development, rather than the need to identify specific new development sites.

Comparison Capacity

19.49 Table 3 (Appendix 13) sets out the total residual capacity for new comparison goods floorspace in the West Dorset local authority area after allowing for the turnover of all known commitments. Tables 4-10 disaggregates this total capacity for the main centres (i.e. Dorchester, Bridport, Lyme Regis, Sherborne and Beaminster), the small local centres and villages, and the District's out-of-centre retail floorspace.

19.50 The table below summarises the comparison goods capacity for the District, main centres and stores over the plan period.

Table 19.3: West Dorset DC: Comparison Goods Capacity (Net) by Locations (sqm)

	2021	2026	2031	2033	2036
Dorchester	1,199	3,305	4,741	5,570	6,859
Bridport	502	1,331	1,897	2,224	2,731
Lyme Regis	45	119	170	199	245
Sherborne	229	607	865	1,013	1,245
Beaminster	18	48	68	79	98
All smaller villages/local centres	24	64	92	107	132
All Out-of-Centre	-1,958	-1,746	-1,602	-1,519	-1,389
TOTAL WEST DORSET LPA AREA WIDE COMPARISON GOODS CAPACITY	58	3,728	6,231	7,675	9,920

19.51 The table shows limited District-wide capacity for 58 sqm net of new comparison goods floorspace between 2017 and 2021 after allowing for all known commitments. The forecast capacity increases thereafter to 3,728 sqm net by 2026, 6,231 sqm net by 2031, 7,675 sqm net by 2033 and 9,920 sqm net by 2036.

19.52 The majority of this capacity is forecast for Dorchester. There is a potential need for 1,199 sqm net in 2021, increasing to 3,305 sqm net by 2026³⁹, 5,570 sqm net by 2033 and 6,859 sqm net by 2036. This need could

³⁹ The 2008 retail assessment identified capacity for some 22,107 sqm net in Dorchester by 2026.

potentially be met over the short (up to 2021) to medium term (up to 2026) though possible infill development and/or change of use applications. However, given the scale of need forecast up to 2036, we advise that the Council will need to identify a site or sites in and/or on the edge of Dorchester town centre to meet the forecast need in full over the plan period in compliance with the NPPF (paragraph 23).

- 19.53 Although the forecast capacity for new comparison goods floorspace in Bridport and Sherborne is more limited, the Council will nevertheless have to consider how best to meet this need as part of its plan-making. This could be achieved through infill development and/or change of use applications, but it may also be necessary for the Council to identify a site or sites to meet the identified need in full over the plan period.
- 19.54 There is limited forecast capacity for new comparison goods floorspace in the District's other main centres and smaller local centres/villages. There is also no capacity for new out-of-centre floorspace after taking account of all known commitments at the base year. This does not mean, however, that there will be no market demand and/or applications for new out-of-centre retail floorspace over the plan period. The Council will therefore need to put in place robust development management policies in accordance with the NPPF (paragraphs 24-27) that will enable the assessment and determination of any future applications that are not in a centre and not in accordance with an up-to-date development plan.

Weymouth and Portland - Capacity Forecasts

- 19.55 The following sets out the convenience and comparison goods capacity forecasts for the main centres and stores in the Weymouth and Portland local authority area. The detailed capacity tabulations for convenience and comparison goods are set out in Appendix 14 and 15 respectively.

Convenience Capacity

- 19.56 Table 3 (Appendix 14) sets out the total residual capacity for new convenience goods floorspace in the Weymouth and Portland local authority area after allowing for the turnover of all known commitments. Tables 4-8 disaggregate this total capacity for the main centres (i.e. Weymouth, Portland – Easton and Portland – Fortuneswell), the small local centres and villages, and the Borough's out-of-centre retail floorspace.
- 19.57 The table below summarises the convenience goods capacity forecasts in Tables 4-8 (Appendix 14) for new 'superstore format' floorspace:

Table 19.4: Weymouth & Portland BC: Convenience Goods Capacity (Net) by Locations – New Superstore Format (sqm)

	2021	2026	2031	2033	2036
Weymouth	62	128	145	159	182
Portland, Easton	127	173	180	195	218
Portland, Fortuneswell	-189	-185	-185	-183	-181
All smaller villages/local centres	19	43	50	55	62
All Out-of-Centre	441	1,213	1,416	1,590	1,861
TOTAL WEYMOUTH & PORTLAND LPA - CONVENIENCE GOODS CAPACITY	460	1,371	1,606	1,816	2,142

- 19.58 The forecasts show limited Borough-wide capacity of 460 sqm net for new convenience goods floorspace in the between 2017 and 2021 after taking account of all known commitments. This scale of capacity could accommodate one or two smaller convenience stores up to 2021.
- 19.59 The Borough-wide capacity increases thereafter to 1,371 sqm net by 2026; 1,606 sqm net at 2031; 1,816 sqm net by 2033; and 2,142 sqm net by 2036.

- 19.60 As the summary table shows, there is limited forecast capacity for new convenience good floorspace in Weymouth (i.e. 128 sqm net by 2026⁴⁰, increasing to 182 sqm net by 2036) and the Borough's main centres. There is no forecast capacity for Portland-Fortuneswell after allowing for committed floorspace. In our judgement this forecast capacity in the main centres could be met through infill development, change of use applications and/or extensions to existing stores, without the need to identify larger comprehensive development in-centre or edge-of-centre sites.
- 19.61 Notwithstanding this, there is significant capacity for new convenience goods floorspace generated by the Borough's existing out-of-centre foodstores; 1,213 sqm net in 2021, increasing to 1,861 sqm net by 2036. This new floorspace should be directed to the Borough's existing centres first, followed by edge of centre locations as a priority ahead of allowing new out-of-centre retail floorspace, in accordance with the sequential approach set out in the NPPF. If no suitable sites are available in existing centres, then the forecast need could be met through the extension of existing out-of-centre stores (where possible), provided that the new floorspace satisfies the sequential and impact tests (NPPF; paragraphs 26-27).
- 19.62 Turning to the forecast capacity for new '*supermarket/discounter format*' floorspace, the summary table below shows District-wide need for 736 sqm net over the short term (2017 to 2021). There is increasing capacity for 2,905 sqm net by 2033 (which would support two additional Aldi/Lidl stores) and 3,428 sqm net by 2036 (which could possibly support up to three Aldi/Lidl stores).

Table 19.5: Weymouth and Portland BC: Convenience Goods Capacity (Net) by Location – New Supermarket / Discounter Format

	2021	2026	2031	2033	2036
Weymouth	100	204	231	255	292
Portland, Easton	203	277	288	312	349
Portland, Fortuneswell	-303	-297	-296	-294	-290
All smaller villages/local centres	31	69	80	87	98
All Out-of-Centre	705	1,940	2,266	2,545	2,978
TOTAL WEYMOUTH & PORTLAND LPA - CONVENIENCE GOODS CAPACITY	736	2,194	2,570	2,905	3,428

- 19.63 As for 'superstore format' floorspace, there is limited capacity for new 'supermarket/discounter format' retailing in the Borough's main centres. Here again, the scale of floorspace capacity forecast would not require the identification of significant sites to meet the need. Notwithstanding this, the fact that the 'bulk' of the capacity is generated by existing out-of-centre stores – 2,978 sqm net by 2036 – will mean that the Council will have to identify a suitable site or sites in and/or on the edge of existing centres first to meet the forecast need in full, ahead of providing for new out-of-centre floorspace, in compliance with the NPPF (paragraph 24). As stated above, if no suitable sites are available in or on the edge of existing centres, then the forecast need could be met through the extension of existing out-of-centre stores (where possible) or new stores, provided that the new floorspace satisfies the sequential and impact tests (NPPF; paragraphs 26-27).

Comparison Capacity

- 19.64 Table 3 (Appendix 15) sets out the total Borough-wide capacity for new comparison goods floorspace in the Weymouth and Portland local authority area after allowing for the turnover of all known commitments. Tables 4-8 disaggregate this total capacity for the main centres (i.e. Weymouth, Portland – Easton and Portland – Fortuneswell), the small local centres and villages, and the Borough's out-of-centre retail floorspace.

⁴⁰ By way of comparison the 2008 retail assessment for Weymouth identified no additional capacity by 2026.

- 19.65 The table below summarises the comparison goods capacity for the Borough and its main centres and stores over the plan period. The forecasts are based on the same average sales levels for new floorspace and turnover 'efficiency' growth rates as assumed for West Dorset.

Table 19.6: Weymouth and Portland BC: Comparison Goods Capacity (Net) by Locations (sqm)

	2021	2026	2031	2033	2036
Weymouth	1,185	3,467	5,024	5,922	7,319
Portland, Easton	43	114	163	191	234
Portland, Fortuneswell	2	6	9	10	12
All smaller villages/local centres	40	106	151	177	218
All Out-of-Centre	293	778	1,108	1,299	1,595
TOTAL WEYMOUTH & PORTLAND BOROUGH-WIDE COMPARISON GOODS CAPACITY	1,563	4,472	6,455	7,599	9,379

- 19.66 The table shows Borough-wide capacity for 1,563 sqm net of new comparison goods floorspace between 2017 and 2021 after allowing for all known commitments. The forecast capacity increases thereafter to 4,472 sqm net by 2026, 6,455 sqm net by 2031, 7,599 sqm net by 2033 and 9,379 sqm net by 2036.
- 19.67 The majority of this capacity is forecast for Weymouth; with a forecast need for 3,467 sqm net by 2026⁴¹, increasing to 5,024 sqm net by 2031 and 7,319 sqm net by 2036. This need could potentially be met over the short (up to 2021) to medium term (up to 2026) though possible infill development and/or change of use applications. However, given the scale of need forecast up to 2036, we advise that the Council will need to identify a site or sites in and/or on the edge of Weymouth to meet the forecast need in full over the plan period in compliance with the NPPF (paragraph 23).
- 19.68 The forecast capacity for new comparison goods floorspace in Portland-Easton, Portland-Fortuneswell and the Borough's smaller centres/villages is more limited. This need could possibly be met in full through infill development and/or change of use applications, although it may be prudent for the Council to identify a site or sites in these centres to meet the future need and any potential market demand.
- 19.69 This is further underlined by the fact that there is forecast capacity generated by the Borough's existing out-of-centre stores for 1,108 sqm net by 2031, increasing to 1,595 sqm net by 2036. This additional need should be directed to the main centres and edge-of-centre sites first in accordance with the sequential approach. If sites cannot be identified, the Council will need to put in place robust development management policies in accordance with the NPPF (paragraphs 24-27) that will enable the assessment and determination of any future applications that are not in a centre and not in accordance with an up-to-date development plan.

North Dorset - Capacity Forecasts

- 19.70 The following sets out the convenience and comparison goods capacity forecasts for the main centres and stores in the North Dorset local authority area. The detailed capacity tabulations for convenience and comparison goods are set out in Appendix 16 and 17 respectively.

⁴¹ The 2008 retail assessment for Weymouth identified capacity for 23,309 sqm net by 2026.

Convenience Capacity

- 19.71 Table 3 (Appendix 16) shows the total residual capacity for new convenience goods floorspace in the North Dorset local authority area after allowing for the turnover of all known commitments. Tables 4-10 disaggregate this total capacity for the main centres (i.e. Blandford Forum, Gillingham, Shaftesbury, Sturminster Newton and Stalbridge), the small local centres and villages, and the District's out-of-centre retail floorspace.
- 19.72 The table below summarises the convenience goods capacity forecasts in Tables 4-10 (Appendix 16) for new 'superstore format' floorspace:

Table 19.7: North Dorset DC: Convenience Goods Capacity (Net) by Locations – New Superstore Format (sqm)

	2021	2026	2031	2033	2036
Blandford Forum	58	135	165	191	232
Gillingham	271	617	846	967	1,151
Shaftesbury	136	206	237	274	329
Sturminster Newton	44	115	163	186	221
Stalbridge	19	31	37	43	52
All smaller villages/local centres	7	15	18	21	26
All Out-of-Centre	-582	-394	-303	-239	-141
TOTAL NORTH DORSET LPA - CONVENIENCE GOODS CAPACITY	-47	725	1,164	1,443	1,870

- 19.73 The forecasts show no District-wide capacity over the short term (between 2017 and 2021) after taking account of all known commitments. The capacity increases thereafter to 725 sqm net by 2026; 1,164 sqm net at 2031; 1,443 sqm net by 2033; and 1,870 sqm net by 2036⁴².
- 19.74 As the summary table shows, the majority of this District-wide capacity is forecast for Gillingham. In our judgement the 1,151 sqm net forecast by 2036 could support a food store, or possibly three smaller convenience stores.
- 19.75 There is limited forecast capacity for new convenience good floorspace in Blandford Forum, Shaftesbury, Sturminster Newton and Stalbridge over the forecast period. This need could be met through the provision of a smaller convenience store in the main centres, or an extension to existing stores (where possible), or through change of use applications.
- 19.76 The District's existing out-of-centre food stores are not generating capacity for new convenience goods floorspace after allowing for all known commitments. However, this does not mean that there will be no potential market demand and/or applications for new convenience goods floorspace in out-of-centre locations over the plan period. The Council will therefore need to put in place robust development management policies in accordance with the NPPF (paragraphs 24-27) that will enable the assessment and determination of any future applications that are not in a centre and not in accordance with an up-to-date development plan.
- 19.77 Turning to the forecast capacity for new 'supermarket/discounter format' floorspace, the summary table below shows there is no District-wide need over the short term (2017 to 2021). There is increasing capacity for 2,309 sqm net by 2033 (which would potentially support up to two additional Aldi/Lidl stores) and 2,992 sqm net by 2036 (which could possibly support up to two or three Aldi/Lidl stores).

Table 19.8: North Dorset DC: Convenience Goods Capacity (Net) by Location – New Supermarket / Discounter Format

⁴² By way of comparison, the 2008 Joint Retail Assessment (for Christchurch Borough Council, East Dorset District Council, North Dorset District Council and Purbeck District Council) identified capacity for 1,770 sqm net of new convenience goods floorspace by 2021, increasing to 2,099 sqm net by 2026.

	2021	2026	2031	2033	2036
Blandford Forum	93	215	264	305	371
Gillingham	433	986	1,354	1,548	1,842
Shaftesbury	217	330	379	438	526
Sturminster Newton	71	183	261	298	354
Stalbridge	30	50	59	69	84
All smaller villages/local centres	11	24	29	34	41
All Out-of-Centre	-931	-630	-485	-383	-225
TOTAL NORTH DORSET LPA - CONVENIENCE GOODS CAPACITY	-75	1,160	1,862	2,309	2,992

19.78 As for 'superstore format' floorspace, there is limited capacity for new 'supermarket/discounter format' retailing in the District's main centres. This is apart from Gillingham, which could potentially support a new Aldi/Lidl store towards the end of the forecast period; subject to market demand.

19.79 The scale of floorspace capacity forecast does not suggest that there is a pressing need to identify and allocate new sites in Blandford Forum, Shaftesbury, Sturminster Newton or Stalbridge for new convenience goods floorspace. However, given the scale of need forecast for Gillingham, we advise the Council that it should seek to identify and allocate a site or sites in or on the edge of the town centre to meet this need in full as part of its plan-making. If no suitable sites are available in or on the edge of existing centres, then the forecast need could be met through the extension of existing out-of-centre stores (where possible) or new stores, provided that the new floorspace satisfies the sequential and impact tests at the time (NPPF; paragraphs 26-27).

Comparison Capacity

19.80 Table 3 (Appendix 17) sets out the total District-wide capacity for new comparison goods floorspace in the North Dorset local authority area after allowing for the turnover of all known commitments. Tables 4-10 disaggregate this total capacity for the main centres, the small local centres and villages, and the Borough's out-of-centre retail floorspace.

19.81 The table below summarises the comparison goods capacity for the Borough and its main centres and stores over the plan period. The forecasts are based on the same average sales levels for new floorspace and turnover 'efficiency' growth rates as assumed for the West Dorset and Weymouth and Portland retail capacity assessments.

Table 19.9: North Dorset DC: Comparison Goods Capacity (Net) by Locations (sqm)

	2021	2026	2031	2033	2036
Blandford Forum	493	1,307	1,863	2,183	2,682
Gillingham	202	537	765	897	1,102
Shaftesbury	317	842	1,200	1,406	1,727
Sturminster Newton	118	314	448	525	645
Stalbridge	22	57	81	95	117
All smaller villages/local centres	5	12	17	20	25
All Out-of-Centre	-1,934	-1,874	-1,833	-1,810	-1,773
TOTAL NORTH DORSET LPA AREA WIDE COMPARISON GOODS CAPACITY	-777	1,196	2,541	3,317	4,524

19.82 The table shows there is no District-wide capacity for new comparison goods floorspace over the short term (between 2017 and 2021) after allowing for all known commitments. The forecast capacity increases thereafter to 1,196 sqm net by 2026, 2,541 sqm net by 2031, 3,317 sqm net by 2033 and 4,524 sqm net by 2036.

- 19.83 The majority of this capacity is forecast for the three main centres of Blandford Forum, Gillingham and Shaftesbury. This need could potentially be met over the short (up to 2021) to medium term (up to 2026) through possible infill development and/or change of use applications. However, given the scale of need forecast up to 2036, we advise that the Council will need to identify a site or sites in and/or on the edge of these main centres to meet the forecast need in full over the plan period in compliance with the NPPF (paragraph 23).
- 19.84 There is more limited forecast capacity for Sturminster Newton, Stalbridge and the smaller local centres/villages over the plan period. This need could possibly be met in full through infill development and/or change of use applications, although it may be prudent for the Council to identify a site or sites in these centres to meet the future need and/or any potential market demand that may arise from retailers seeking space in these centres.
- 19.85 As the table shows, there is no forecast capacity generated by the District's existing out-of-centre stores after allowing for all known commitments.
- 19.86 If sites cannot be identified either in or on the edge of existing centres then the Council will need to put in place robust development management policies in accordance with the NPPF (paragraphs 24-27) that will enable the robust assessment and determination of any future applications for new retail floorspace proposed outside of centres and not in accordance with an up-to-date development plan.

Summary

- 19.87 This section has assessed the potential (economic) capacity for new retail (convenience and comparison) good floorspace in the three local authority areas of North Dorset, West Dorset and Weymouth and Portland between 2017 and 2036.
- 19.88 It is important to restate that capacity forecasts beyond five years should be interpreted with caution. This is because they are based on various layers of assumptions and forecasts with regard to changes in the national and local economy; the trading performance of existing centres and stores; the growth in population and retail spending; etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could further 'dampen' the future demand and capacity for new (physical) floorspace over the long term. The Councils should therefore take into account these margins for error when assessing the need for new retail floorspace over the medium term (5-10 years) and long term (10 years plus).
- 19.89 Notwithstanding these caveats, the capacity forecasts do nevertheless provide a broad framework to help inform plan-making across the local authority areas, including the potential need to identify and allocate sites for new retail floorspace in the main centres and edge of centre sites.
- 19.90 In summary the tables below set out the 'global' capacity for new ('superstore format' and 'supermarket/discounter format') **convenience goods** floorspace across the defined study area, broken down by the main centres in each local authority, the smaller local centres/villages and all out-of-centre retailing.

Table 19.10: 'Global' Convenience Goods Capacity (Net) – New 'Superstore Format' (sqm)

LOCATIONS / LPA AREA	2021	2026	2031	2033	2036
MAIN CENTRES					
WEST DORSET	308	550	617	726	895
WEYMOUTH & PORTLAND	-0	115	140	171	220
NORTH DORSET	528	1,104	1,448	1,661	1,985
Subtotal	836	1,769	2,205	2,558	3,099
ALL SMALLER VILLAGES/LOCAL CENTRES					
WEST DORSET	76	140	155	181	221
WEYMOUTH & PORTLAND	19	43	50	55	62
NORTH DORSET	7	15	18	21	26
Subtotal	102	198	223	257	308
ALL OUT-OF-CENTRE					
WEST DORSET	-795	-365	-245	-55	239
WEYMOUTH & PORTLAND	441	1,213	1,416	1,590	1,861
NORTH DORSET	-582	-394	-303	-239	-141
Subtotal	-936	454	868	1,296	1,959
AGGREGATED TOTAL	2	2,422	3,297	4,111	5,367

Table 19.11: 'Global' Convenience Goods Capacity (Net) – New 'Supermarket/Discounter Format' (sqm)

LOCATIONS / LPA AREA	2021	2026	2031	2033	2036
MAIN CENTRES					
WEST DORSET	493	880	988	1,162	1,431
WEYMOUTH & PORTLAND	-0	185	223	273	352
NORTH DORSET	845	1,766	2,317	2,658	3,176
Subtotal	1,338	2,831	3,528	4,093	4,959
ALL SMALLER VILLAGES/LOCAL CENTRES					
WEST DORSET	121	224	248	290	354
WEYMOUTH & PORTLAND	31	69	80	87	98
NORTH DORSET	11	24	29	34	41
Subtotal	163	317	358	411	493
ALL OUT-OF-CENTRE					
WEST DORSET	-1,272	-584	-393	-88	382
WEYMOUTH & PORTLAND	705	1,940	2,266	2,545	2,978
NORTH DORSET	-931	-630	-485	-383	-225
Subtotal	-1,498	727	1,389	2,073	3,135
AGGREGATED TOTAL	3	3,875	5,275	6,577	8,587

19.91 The aggregated 'global' capacity forecasts show that there is no need for new convenience goods floorspace over the short term (i.e. 2017-2021). For 'superstore format' floorspace the forecast 'global' capacity increases to:

- 2,422 sqm net by 2026;
- 3,297 sqm net by 2031;
- 4,111 sqm net by 2033; and
- 5,367 sqm net by 2036.

19.92 The majority of this floorspace capacity is accounted for by the main centres in the three local authority areas. At 2026 the 1,769 sqm net of forecast capacity in these main centres accounts for circa 73% of the total floorspace need of 2,422 sqm net. By 2036 the capacity forecast for the main centres increases to 3,099 sqm net. However this represents a smaller proportion (57.8%) of the total 'global' capacity of 5,367 sqm net, due to the forecast growth in floorspace capacity generated by the out-of-centre food stores at 2036 (i.e. 1,959

sqm net). This additional growth should however be focused on town centre locations in preference to out of centre locations in accordance with the sequential approach in the NPPF.

19.93 There is limited forecast capacity for new convenience goods floorspace in the smaller local centres and villages in the three local authority areas.

19.94 For **comparison goods**, the table below summarises the forecast capacity for new floorspace over the forecast period.

Table 19.12: 'Global' Comparison Goods Capacity (Net sqm)

LOCATIONS / LPA AREA	2021	2026	2031	2033	2036
MAIN CENTRES					
WEST DORSET	1,992	5,410	7,741	9,086	11,177
WEYMOUTH & PORTLAND	1,230	3,588	5,195	6,123	7,565
NORTH DORSET	1,152	3,058	4,357	5,107	6,273
Subtotal	4,374	12,056	17,294	20,316	25,016
ALL SMALLER VILLAGES/LOCAL CENTRES					
WEST DORSET	24	64	92	107	132
WEYMOUTH & PORTLAND	40	106	151	177	218
NORTH DORSET	5	12	17	20	25
Subtotal	69	183	260	305	375
ALL OUT-OF-CENTRE					
WEST DORSET	-1,958	-1,746	-1,602	-1,519	-1,389
WEYMOUTH & PORTLAND	293	778	1,108	1,299	1,595
NORTH DORSET	-1,934	-1,874	-1,833	-1,810	-1,773
Subtotal	-3,599	-2,843	-2,327	-2,030	-1,567
AGGREGATED TOTAL	844	9,396	15,227	18,591	23,823

19.95 The forecasts show that 'global' comparison goods capacity across the study area is predicted to increase from 844 sqm net in 2021, to:

- 9,396 sqm net by 2026;
- 15,227 sqm net by 2031;
- 18,591 sqm net by 2033; and
- 23,823 sqm net by 2036.

19.96 The main centres in each local authority area account for the majority of the forecast capacity over the plan period, by 2036.

- The greatest capacity is forecast for **West Dorset's** main centres (11,177 sqm net), and specifically for Dorchester (6,859 sqm net).
- For **Weymouth and Portland** the 'bulk' of the capacity forecast for all the main centres at 2036 (7,565 sqm net) is mainly focussed on Weymouth (7,319 sqm net).
- For **North Dorset** the total capacity at 2036 (6,273 sqm net) is more evenly distributed between Blandford Forum (2,682 sqm net), Shaftesbury (1,727 sqm net) and Gillingham (1,102 sqm net).

19.97 There is no forecast capacity for new out-of-centre comparison goods floorspace, after taking account of all known commitments. There is also limited capacity for new comparison goods in the smaller local centres and villages across the local authority areas.

- 19.98 In conclusion, the NPPF (paragraph 24) states that, in drawing up Local Plans, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure and other main town centre uses *“are met in full and are not compromised by limited site availability”* and local planning authorities should therefore *“undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites”*.
- 19.99 Where suitable and viable town centre sites are not available, the NPPF states that local planning authorities should *“allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre”*. If sufficient edge of centre sites cannot be identified, then local planning authorities should set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.
- 19.100 We provide a high level review of the availability and suitability of the potential opportunity sites identified by the respective local planning authorities to accommodate the forecast need for new retail floorspace over the plan period in more detail in Sections 21-23.

20 COMMERCIAL LEISURE NEEDS ASSESSMENT

- 20.1 The NPPF (paragraph 23) states that in drawing up Local Plans to ensure the vitality of town centres, local planning authorities should promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres.
- 20.2 Against this background leisure uses can make a significant contribution to a town centre's vitality and viability. For example, a good provision and choice of leisure facilities and uses can help to increase 'dwell times', footfall and turnover in centres, with significant benefits for both daytime and evening economies.
- 20.3 However, forecasting the need for new commercial leisure uses is more complicated and problematic than for retailing, as the sector is highly complex and dynamic, and particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently the methods and approaches developed to forecast the need for new commercial leisure floorspace and uses are more wide-ranging and less sophisticated than for retail capacity forecasts.
- 20.4 The NPPF recommends that need assessments for new leisure uses and floorspace should take account of both quantitative and qualitative considerations (paragraph 161). In this context our analysis focuses on the following key elements:
- a review of the key trends driving market demand in the sector over the last decade;
 - an audit of existing commercial leisure uses in the three Council areas to help identify any marked 'gaps' in provision;
 - a review of the results of the household survey to understand current commercial leisure participation rates and preferences across the study area; and
 - a broad economic assessment of the need for new additional leisure facilities across the main centres based on different datasets and accepted approaches.
- 20.5 For the purpose of our assessment we have necessarily focussed on the main commercial leisure uses that are widely accepted as making a significant contribution to the overall vitality and viability of town centres; namely food and beverage uses (Class A3-A5), cinemas and health clubs and gyms, and to a lesser extent ten-pin bowling, casinos and bingo halls.
- 20.6 Detailed tables on forecast commercial leisure capacity, including projections on expenditure and need are set out below.

Leisure Expenditure Growth

- 20.7 Like the retail market, the commercial leisure sector has experienced significant growth in consumer and market demand since the mid-1990s; fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the leisure sector has not been immune to the impact of the recent economic downturn, leisure activities remain an important lifestyle choice for many consumers who are prioritising leisure over other areas of spending.
- 20.8 The table below shows the UK average expenditure per head per annum on commercial leisure services and the average for the defined study area based on Experian data. It shows that UK household spending on leisure services is dominated by the restaurant and café category (including pubs). This pattern is broadly repeated across all the zones.

Table 20.1 Estimates of Expenditure per Capita on Leisure Services in 2017

	Accommodation	Cultural services	Games of chance	Hairdressing & personal grooming	Recreational & sporting services	Restaurants, cafes, etc.	Total
Zone 1	£166	£244	£217	£57	£77	£796	£1,556
Zone 2	£257	£292	£178	£86	£119	£983	£1,914
Zone 3	£300	£320	£188	£100	£149	£1,152	£2,210
Zone 4	£329	£319	£177	£108	£157	£1,188	£2,278
Zone 5	£278	£304	£180	£100	£128	£1,044	£2,034
Zone 6	£295	£303	£166	£100	£145	£1,133	£2,142
Zone 7	£362	£334	£160	£117	£173	£1,248	£2,394
Zone 8	£334	£316	£171	£106	£156	£1,188	£2,271
Zone 9	£317	£311	£177	£105	£150	£1,129	£2,190
Zone 10	£284	£296	£178	£95	£137	£1,076	£2,065
Zone 11	£334	£331	£173	£112	£166	£1,178	£2,294
Zone 12	£297	£308	£162	£101	£148	£1,108	£2,124
Study Area Average (£)	£296	£307	£177	£99	£142	£1,102	£2,123
(% of Total)	13.9%	14.4%	8.3%	4.7%	6.7%	51.9%	100.0%
Weymouth & Portland (Zones 1 & 2) (£)	£211	£268	£197	£71	£98	£889	£1,735
(% of Total)	12.2%	15.5%	11.4%	4.1%	5.6%	51.3%	100.0%
West Dorset Average (Zones 3 to 9) (£)	£316	£315	£174	£105	£151	£1,155	£2,217
(% of Total)	14.3%	14.2%	7.8%	4.7%	6.8%	52.1%	100.0%
North Dorset Average (Zones 10, 11, 12) (£)	£305	£312	£171	£103	£150	£1,120	£2,161
(% of Total)	14.1%	14.4%	7.9%	4.8%	7.0%	51.8%	100.0%
UK Average (£)	£243	£293	£156	£100	£129	£1,093	£2,014
(% of Total)	12.1%	14.5%	7.7%	5.0%	6.4%	54.3%	100.0%

Source: Experian, 2015 prices.

- 20.9 The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in *Retail Planner Briefing Note 15* (December 2017). EBS forecasts shows a decreasing growth forecast in the short term (2016-2018) before stabilising over the longer term (from 2019) to between +1.1% and 1.2% per annum. This forecast growth is higher than annual average historic growth rates for the period 1997-2015, when there was no growth in leisure spend.

Table 20.2 Actual & Forecast Growth in UK Leisure Spend (% per annum)

	2015	2016	2017	2018	2019	2020-2024	2025-2036
Leisure Spend Growth (%)	1.7	0.7	0.3	-0.1	0.8	1.1	1.2

Source: Experian Business Strategies, Retail Planner Briefing Note 15 (December 2018), Figure 1a and 1b

- 20.10 The base year expenditure per capita levels for leisure (**Table 20.1**) have been projected forward to 2036 using Experian's forecast annual growth rates (**Table 20.2**), and then applied to the projected population for each Study Zone (based on Table 3, Appendix 2) to calculate the total available expenditure on leisure and recreation goods and services (**Table 20.3**).

Table 20.3 Total Forecast Growth in Commercial Leisure Expenditure: 2017 – 2036 (£m)

Zone	2017	2021	2026	2031	2033	2036	Change: 2017-2036	
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(%)
Zone 1	19.8	22.5	24.4	26.0	26.9	28.2	8.4	42.4%
Zone 2	95.4	103.9	117.7	127.7	132.2	139.1	43.7	45.8%
Zone 3	29.6	33.7	38.5	41.4	43.7	47.2	17.6	59.5%
Zone 4	74.9	80.9	89.6	97.3	101.4	107.9	33.0	44.0%
Zone 5	42.1	48.4	54.6	58.6	62.0	67.3	25.3	60.1%
Zone 6	29.5	32.8	37.2	40.0	41.8	44.6	15.2	51.4%
Zone 7	24.9	26.6	28.6	30.3	31.3	32.9	8.0	32.0%
Zone 8	23.2	25.1	26.6	28.5	29.5	31.0	7.7	33.3%
Zone 9	67.2	71.8	77.1	82.3	85.0	89.3	22.1	32.9%
Zone 10	57.9	63.6	73.6	83.0	87.2	93.9	35.9	62.0%
Zone 11	46.3	50.8	54.8	58.5	60.6	64.0	17.7	38.2%
Zone 12	65.8	70.2	77.0	82.9	85.9	90.7	24.9	37.9%
Study Area (£)	576.6	630.3	699.7	756.6	787.6	836.1	259.5	45.0%
Weymouth & Portland (Zones 1 & 2) (£)	115.2	126.5	142.1	153.7	159.1	167.4	52.1	45.2%
West Dorset Average (Zones 3 to 9) (£)	291.4	319.3	352.3	378.5	394.7	420.2	128.8	44.2%
North Dorset Average (Zones 10, 11, 12) (£)	170.0	184.6	205.3	224.3	233.8	248.5	78.5	46.2%

Note: All monetary figures are expressed in 2015 prices.

20.11 As **Table 20.3** shows, the available commercial leisure expenditure across the defined study area is forecast to increase by 45% (+£259.5m) up to 2036. For the individual LPAs the forecast growth is as follows:

- **Weymouth & Portland LPA (Zones 1-2):** forecast growth of +45.2% (+£52.1m);
- **West Dorset LPA (Zones 3-9):** growth of +44.2% (+£128.8m); and
- **North Dorset LPA (Zones 10-12):** growth of +46.2% (+£78.5m).

20.12 The percentage growth in commercial leisure expenditure is forecast to be highest in Zones 10 (+62%), 5 (60.1%), 3 (+59.5%) and 2 (+59.5%); this reflects the higher projected population growth in these zones. The forecast growth is lowest in Zone 12 (+37.9%).

20.13 Based on the broad leisure expenditure profile, the majority of the growth in leisure expenditure is likely to be weighted towards eating and drinking out. This highlights the potential to enhance the scale and quality of Class A3-A5 uses in the centres within the individual LPAs over the development plan period, subject to market demand.

20.14 Against this background, the following commentary identifies the potential 'gaps' in the commercial leisure offer of the Council's main centres and the likely need for new uses and facilities over the forecast period.

Cinema Capacity

20.15 Although cinema audiences grew significantly during the 1990s, the UK cinema market has traditionally been dominated by a handful of operators namely Cineworld (the UK's largest operator, with over a quarter of the cinema box office market), Odeon/UCI; Vue; and Showcase (the UK arm of National Amusements of the

USA). There was significant consolidation in the UK market in 2012 when Odeon acquired the BFI Southbank and a site from AMC; Vue acquired the Apollo cinema chain; and Cineworld acquired Picturehouse. This trend of acquisition and consolidation in the sector is set to continue over the short term in our view.

- 20.16 According to research by Dodona (a specialist market research consultancy in the cinema industry) at the end of 2015, the UK had 4,046 screens, 137 more than in 2014, in 751 cinemas in the UK. Approximately three-quarters (77%) of the screens are in multiplexes. It should be noted that the number of cinemas has fluctuated, with a low of 697 in 2006 and a high of 769 in 2012. This has been influenced by the increase in the number of multiplex screens and the loss of 'traditional' cinemas. The rest of the market is mainly represented by smaller multiplex operators and independents which tend to operate non-multiplex cinemas (i.e. less than six screens) and screens in mixed-use venues (such as art centres); including The Light, Curzon and Everyman cinemas. Everyman cinema reported in early 2017 that demand for its "*home from home*" experience is growing around the UK with new openings planned for 2018 venues in York, Liverpool and Newcastle, as well as London's Borough Market in 2020.
- 20.17 The cinema industry has not been immune from the recession and there have been some closures since 2008, although the majority have been smaller art centre venues rather than the larger chains. Notwithstanding this, the industry generally appears to be in good health and the UK is the second largest consumer market for filmed entertainment in the world after the USA. The latest research shows that box office revenue in 2015 in the UK exceeded £1bn for the fifth year in succession, based on 171.5m admissions. Overall the cinema sector has remained relatively resilient in the prevailing economic and consumer environment.
- 20.18 In recent years, cinema operators have also introduced changes to the cinema experience, including premium seating areas and better quality refreshments, such as alcohol and higher quality food. For example, Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas, as well as regular seats. Cineworld has also introduced the 'Screening Room' concept, characterised by leather chairs and table service.
- 20.19 There has also been a growth in smaller (Digital) cinemas to serve smaller catchment areas. These Digital cinemas are more flexible and less "space-hungry", as they do not require the large sloping auditoriums needed to accommodate traditional projectors. There are therefore opportunities for modern cinema offer to be provided in existing buildings. Examples include the HMV in Wimbledon which has a small Curzon cinemas above the store; Genesis, Whitechapel; The Grosvenor, Glasgow; Watershed, Bristol and the Lynton Cinema, Lynton.
- 20.20 Turning to the cinema provision in the study area, the key commercial purpose built cinemas include:
- **Odeon, Dorchester** – Weymouth Avenue (3 screens)
 - **Plaza, Dorchester** – Trinity Street (4 screens)
 - **Cineworld, Weymouth** – New Bond Street (9 screens)
- 20.21 Additionally, independent cinemas within the study area include, amongst others:
- the Electric Palace on South Street in Bridport (1 screen);
 - Moviola, Beaminster (1 screen);
 - The Regent Cinema (1 screen) in Lyme Regis. This cinema was damaged in a fire in March 2016, although we understand that there are plans for the cinema to reopen.

20.22 The results of the household survey (see table below) show that cinemas within the three Council areas collectively have a market share of 79.3% from within the overall study area. There is a wide variation in retention levels across the three different local authority areas based on current provision:

- West Dorset has the highest retention rate of 63.1%, which reflects its good cinema provision (11 screens). The Plaza Cinema in Dorchester is the most popular venue in the study area as measured by its market share of 47%. The Odeon in Dorchester is also achieving a relatively strong market share of 13.5%.
- Weymouth & Portland has the next highest retention level of 16.1%, which is accounted for by the Cineworld in Weymouth.
- North Dorset has a negligible market share of 0.1%, which reflects its current limited provision and the fact that its households mainly visit cinemas in neighbouring authority areas; including West Dorset and Weymouth and Portland.

Table 20.4 Cinema Facilities in the Study Area

LPA / Venue	Screens	% Visits from Study Area	% Visits from Weymouth & Portland (Zones 1-2)	% Visits from W Dorset (Zones 3-9)	% Visits from N Dorset (Zones 10-12)
West Dorset					
Bridport Arts Centre, Bridport	1	0.7	0.0	1.4	0.0
Electric Palace, Bridport	1	1.4	0.0	2.5	0.0
Moviola Rural Cinema, Beaminster	1	0.1	0.0	0.0	0.0
Odeon, Dorchester	3	13.5	8.9	13.9	11.8
Plaza Cinema, Dorchester	4	47.0	32.6	63.6	14.7
Regent Cinema, Lyme Regis	1	0.5	0.0	1.1	0.0
Subtotal	11	63.1	41.5	82.5	26.5
North Dorset					
The Exchange Cinema, Sturminster Newton	1	0.1	0.0	0.0	1.5
Subtotal	1	0.1	0.0	0.0	1.5
Weymouth & Portland					
Cineworld, Weymouth	9	16.1	58.5	3.2	0.0
Subtotal	9	16.1	58.5	3.2	0.0
Retention from LPA locations	21	79.3	100.0	85.7	27.9
Other Venues	N/A	20.7	0.0	14.3	72.1
Total	21	100.0	100.0	100.0	100.0

Source: HTIS 2017 & Carter Jonas Research

20.23 A standard accepted approach used to assess the current level of cinema provision and future needs is based on national and regional 'screen density' averages (i.e. the number of screens per unit of population). According to Dodona, in 2015, the UK average was 6.3 screens per 100,000 people, up from 6.1 screens in 2014. The table below shows the requirement for additional cinema screens across the study area, based on applying study area retention rate of 79.3% to the forecast growth in the study area population.

20.24 The table shows that there is no quantitative need for new cinema screens over the study period to 2036. This is even after applying a more aspirational UK national average screen density of 6.3 screens per 100,000 people.

Table 20.5 Potential Capacity for New Cinema Screens – Study Area: 2017-2036

	2017	2021	2026	2031	2033	2036
	273,820	290,194	304,305	310,046	315,137	322,741
Retention within study area based on survey results	79.3%	217,248	230,240	241,436	245,990	250,029
Potential Cinema Catchment Population	217,248	230,240	241,436	245,990	250,029	256,063
Cinema Screen Density (screens per 100,000 persons) based on Southern Region	6.3	6.3	6.3	6.3	6.3	6.3
Cinema Screen Potential	14	15	15	15	16	16
Existing Screens	21	21	21	21	21	21
Forecast Screen Potential	0	0	0	0	0	0
Net Screen Potential	-7	-6	-6	-6	-5	-5

Notes: Screen density is used to measure screen provision in a given area. Existing cinema screens account for key cinema facilities only. The net screen potential is derived by subtracting the number of existing screens from the cinema screen potential. Also, figures may not sum precisely due to rounding

20.25 We have further disaggregated the forecast capacity for each Council area and the results are summarised in the following tables:

Table 20.6 Potential Capacity for New Cinema Screens: Weymouth & Portland LPA

	2017	2021	2026	2031	2033	2036
	273,820	290,194	304,305	310,046	315,137	322,741
Retention within study area based on survey results	16.1%	44,194	46,837	49,115	50,041	50,863
Potential Cinema Catchment Population	44,194	46,837	49,115	50,041	50,863	52,090
Cinema Screen Density (screens per 100,000 persons) based on Southern Region	6.3	6.3	6.3	6.3	6.3	6.3
Cinema Screen Potential	3	3	3	3	3	3
Existing Screens	9	9	9	9	9	9
Forecast Screen Potential	0	0	0	0	0	0
Net Screen Potential	-6	-6	-6	-6	-6	-6

Table 20.7 Potential Capacity for New Cinema Screens: West Dorset LPA

	2017	2021	2026	2031	2033	2036
	273,820	290,194	304,305	310,046	315,137	322,741
Retention within study area based on survey results	63.1%	172,671	182,996	191,895	195,515	198,725
Potential Cinema Catchment Population	172,671	182,996	191,895	195,515	198,725	203,521
Cinema Screen Density (screens per 100,000 persons) based on Southern Region	6.3	6.3	6.3	6.3	6.3	6.3
Cinema Screen Potential	11	12	12	12	13	13
Existing Screens	11	11	11	11	11	11
Forecast Screen Potential	0	0	0	0	0	0
Net Screen Potential	0	1	1	1	2	2

Table 20.8 Potential Capacity for New Cinema Screens: North Dorset LPA

	2017	2021	2026	2031	2033	2036
	273,820	290,194	304,305	310,046	315,137	322,741
Retention within study area based on survey results	0.1%	383	406	426	434	441
Potential Cinema Catchment Population	383	406	426	434	441	452
Cinema Screen Density (screens per 100,000 persons) based on Southern Region	6.3	6.3	6.3	6.3	6.3	6.3
Cinema Screen Potential	0	0	0	0	0	0
Existing Screens	1	1	1	1	1	1
Forecast Screen Potential	0	0	0	0	0	0
Net Screen Potential	-1	-1	-1	-1	-1	-1

Note: Figures in all tables may not sum precisely due to rounding

- 20.26 The tables show no need for new cinema screens in North Dorset or Weymouth and Portland up to 2036. There is a potential need for up to 2 more screens in West Dorset over the forecast period. However, given the current limited provision in North Dorset, we consider that the optimum location for a new cinema and screens would be in one of the main centres in North Dorset. This would obviously be dependent on market demand from one of the smaller, more niche cinema operators (such as, for example, The Light, Everyman, Reel, etc.).
- 20.27 To further help inform the assessment of the potential scope for new cinema screens in North Dorset, we have also tested the impact of increasing its study area retention level from 0.1% to a reasonable 10%. The table below shows that the potential need for new cinema screens increasing to one over the forecast period. If the 2 cinema screens identified for West Dorset are also included, then there is a potential need for a 3-screen cinema in one of the North Dorset centres; subject to market demand.

Table 20.9 Potential Capacity for New Cinema Screens in North Dorset LPA based on a higher Retention Level

	2017	2021	2026	2031	2033	2036
	273,820	290,194	304,305	310,046	315,137	322,741
Target Retention Level within study area	10.0%	27,382	29,019	30,431	31,005	31,514
Potential Cinema Catchment Population	27,382	29,019	30,431	31,005	31,514	32,274
Cinema Screen Density (screens per 100,000 persons) based on Southern Region	6.3	6.3	6.3	6.3	6.3	6.3
Cinema Screen Potential	2	2	2	2	2	2
Existing Screens	1	1	1	1	1	1
Forecast Screen Potential	0	0	0	0	0	0
Net Screen Potential	1	1	1	1	1	1

- 20.28 In response to the question as to what improvements could be made to commercial leisure offer that would potentially encourage people to participate more in leisure activities; 4.4% of respondents across the study area stated that they would like a multi-screen cinema. This demonstrates that there could be a qualitative opportunity to improve cinema provision within the study area. Based on our assessment we consider that North Dorset and its main centres represent the optimum location to improve cinema choice and provision across the study area as a whole.
- 20.29 In our judgement, whilst there is no identified quantitative capacity, cinema operators are expanding their venue portfolios into regional towns. If demand does exist this should be directed to town centres first in accordance with national and local policy objectives.

Eating & Drinking Out

- 20.30 The food and beverage sector, including restaurants, cafes, bars and pubs (Class A3, A4, and A5), provide an increasingly important part of the town centre's wider offer and economy. They also complement other town centre uses, particularly shops, offices and cinemas, helping to lengthen 'dwell times' (the time people spend in centres) and increase expenditure as part of the same trip.
- 20.31 As highlighted in **Section 3**, average household expenditure on leisure services in the UK is largely dominated by eating and drinking out. This sector has remained buoyant over time and the year-on-year forecasts for growth by Experian are strong.
- 20.32 The following provides a summary of some of the key trends driving changes in the food and beverage sector over recent years.

- **Pubs and Wine Bars** – Pub operators have widened their food and non-alcoholic beverage offer, resulting in the growth of so-called “gastro-pubs” in competition with more established restaurants, and the rise in ‘micro pubs’. Notwithstanding this the sector has also been characterised by increasing consolidation and closures. Recent research by CAMRA also suggests that on average around 21 pubs closed every week in the UK between June and December 2015. The sale of pubs for conversion to alternative uses has also increased over recent years, particularly for convenience retailing (e.g. Tesco Express and Sainsbury’s Local).
- **Restaurants** – This sector has also experienced mixed fortunes during the economic downturn. Some of the key trends driving change in this sector include an increase in ‘eating at home’, which has increased sales for take-aways and deliveries. At the same time customers are increasingly basing their decisions to eat out on ‘value for money’, but not at the expense of quality in terms of service, food and the overall experience. Recent successes include Jamie’s Italian, Bill’s and Cote, with branded restaurants increasing their share in the market. There has also been a growth in ‘all-you-can-eat’ style restaurants which are aimed at offering value for money (examples include the Taybarns brand owned by Whitbread). In broad terms, and according to recent research⁴³, future F&B growth is most likely to be dominated by multiple operators expanding their presence across the UK.
- **Cafes/Coffee Shops** – This sector has experienced strong growth over the last five years. According to Mintel research, the UK coffee shop market rose by 37%, up from £2.4 billion in 2011 to reach £3.4 billion in 2016. Additionally, between 2015 and 2016 sales increased by 10.4% – the biggest year-on-year boost witnessed in the last five years. The market over the next five years is forecast to grow a further 29%, to reach £4.3 billion⁴⁴. Estimated at 22,845 outlets, the total UK coffee shop market delivered a growth of 6% in outlets in 2016. Costa Coffee, Starbucks Coffee Company, and Caffè Nero remain the UK’s leading chains with a 53% outlet share of the branded coffee shop market. Market leader Costa operates 2,121 UK outlets, adding 129 units in 2016, and Starbucks and Caffè Nero operate 898 and 650 UK outlets respectively. Leading chains continue to expand and enjoy positive like-for-like sales growth, albeit at a slowing pace. However small and medium sized boutique chains such as Coffee#1, Joe & the Juice, and Taylor St. Baristas are gaining momentum and driving the comparable sales growth across the sector, ahead of the leading chains. Increased merger and acquisition activity throughout 2016 signifies the strength of the vibrant coffee shop market in the UK. Activity such as Whitbread’s 49% acquisition of Pure; Tchibo’s acquisition of Matthew Algie; and Caffè Nero’s purchase of Harris+Hoole signals further market convergence⁴⁵. Notwithstanding the rise of the multiples, there has also been growth in independent and specialist cafés and coffee houses, particularly those serving a more luxury or specialist offer (e.g. organic and Fairtrade). The strong independent coffee sector has fuelled many new start-up businesses in local centres. While many forecasters considered the café market to be saturated a few years ago, Allegra⁴⁶ reveals that after 18 years of considerable continued growth, the coffee shop market is one of the most successful in the UK economy and is set to outnumber pubs by 2030 as coffee shops become the new local.

20.33 The household survey identified where people living in the study area currently chose to eat and drink, and whether there are potential ‘gaps’ in the current offer. The survey shows that 60.9% of respondents from the study area visit restaurants and cafes. Furthermore, some 46.1% of respondents from the study area visit pubs/ bars/ nightclubs.

20.34 The survey results also show that 60.9% of respondents living in the study area eat out in restaurants and cafes at least once a month. Of this total figure, 25.5% eat out once a month, 19.6% once a fortnight, and 24.5% once a week. For the respective local authority areas the survey results show:

⁴³ Cushman & Wakefield – UK Food & Beverage Market Sustainable Growth – H1, 2017

⁴⁴ Grande growth: UK coffee shop sales enjoy a growth high – Mintel (12/04/2017)

⁴⁵ UK Coffee Leader Summit - Project Café 2017 UK, by Allegra Strategies, ‘Yet More Growth in UK Coffee Shop Market as Coffee Shops Become the New Local’ (20/01/2017)

⁴⁶ Allegra, Yet More Growth in UK Coffee Shop Market as Coffee Shops Become the New Local’ (20/01/2017), Ibid

- Within the West Dorset area (Zones 3-9) 20.1% eat out once a fortnight, 25.2% once a week and 7.4% more than once a week.
- Within the North Dorset area (Zones 10-12) 20.5% eat out once a month and 25.0% once a week.
- Within the Weymouth and Portland area 25.0% eat out once a month and 22.8% once a week.

20.35 The table below shows where respondents living in the study area normally go to eat and drink. The survey indicates that centres from within the three Council areas collectively have a strong rate of retention (82.8%). Of this, the West Dorset centres are achieving a retention of 43.3%, which compares with 25.8% for Weymouth & Portland and 13.7% for North Dorset. Dorchester is the most popular town centre destination measured by its market share (26.5%), followed by Weymouth (23.5%).

Table 20.10: Preferences on Eating Locations

LPA / Location	% Visit from Study Area	% Visits from Weymouth & Portland (Zones 1-2)	% Visits from West Dorset (Zones 3-9)	% Visits from North Dorset (Zones 10-12)
West Dorset				
Dorchester	26.5	11.8	43.5	7.3
Bridport	6.7	0.0	13.0	0.7
Sherborne	5.3	0.0	9.6	2.7
Lyme Regis	2.2	0.0	4.1	0.7
Beaminster	0.9	0.0	1.7	0.0
Other Locations in W Dorset	1.7	0.7	2.7	0.0
Subtotal	43.3	12.5	74.6	11.3
North Dorset				
Blandford Forum	6.1	0.0	0.0	24.0
Shaftesbury	3.0	0.0	0.0	11.3
Sturminster New ton	2.3	0.0	0.0	9.3
Gillingham	1.4	0.0	0.0	5.3
Other Locations in N Dorset	0.9	0.0	0.7	2.7
Subtotal	13.7	0.0	0.7	52.7
Weymouth & Portland				
Weymouth	23.5	80.6	7.2	0.7
Other Locations in Weymouth & Portland	2.3	6.9	1.0	0.7
Subtotal	25.8	87.5	8.2	1.3
Retention from LPA locations	82.8	100.0	83.5	65.3
All Other Locations	17.2	0.0	16.5	34.7
OVERALL TOTAL	100.0	100.0	100.0	100.0

Source: HTIS 2017

20.36 In terms of nightlife (pub/ bar/ nightclub/ music venue), the headline findings show a strong retention rate from the study area (85.4%). Weymouth Town Centre is the most popular (18.9%), followed by Dorchester (16.6%) and Blandford Forum (10.7%). In terms of the three local authority area:

- West Dorset area (Zones 3-9) - Dorchester is the most popular location (29.2%) followed by Bridport (13.1%);
- North Dorset area (Zones 10-12) - Blandford Forum is the most popular location (34.0%);
- Weymouth and Portland (Zones 1-2) - Weymouth Town Centre is the most popular (76.8%).

20.37 Evidence from other centres in the UK shows that improving a town centre's food and beverage offer can significantly increase the attraction of daytime and evening economies for different customer profiles, as well as generating higher footfall, dwell times and increased expenditure in centres.

20.38 The qualitative 'gap' analysis also shows that in response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more, 0.9% of respondents from the study area suggested more quality restaurants (similar response received from each authority area), and 0.5% suggested more pavement cafes. No respondents indicated that they would like more nightclubs. The survey results provide a broad indication that respondents are generally satisfied with the varied and diverse offer across the study area.

20.39 Turning to the potential need for new F&B uses (floorspace), the table below shows that the total available expenditure for food and drink in the study area is £298.8m in 2017 and this is predicted to increase by 45% (+£134.5m) over the plan period to £433.4m at 2036.

Table 20.11: Total Leisure Spend (£m)

	Study Area: Total Leisure Spend (£m)						Change: 2017-2036	
	2017	2021	2026	2031	2033	2036	(£m)	(%)
Accommodation	80.4	87.8	97.4	105.3	109.6	116.4	£36.0	44.8%
Cultural services	83.7	91.5	101.6	109.9	114.4	121.4	£37.7	45.1%
Games of chance	48.3	52.8	58.7	63.5	66.1	70.2	£21.9	45.4%
Hairdressing salons & personal grooming	26.9	29.4	32.6	35.3	36.7	39.0	£12.1	44.9%
Recreational & sporting services	38.5	42.1	46.7	50.5	52.5	55.8	£17.2	44.8%
Restaurants, cafes, etc.	298.8	326.7	362.6	392.1	408.2	433.4	£134.5	45.0%
Total	576.6	630.3	699.7	756.6	787.6	836.1	£259.5	45.0%

20.40 The HTIS has indicated that centres from within the three Council areas collectively have a strong retention level (82.8%) for eating and drinking out from within the study area. An appropriate strategy should seek to maintain and, where possible, increase this market share over the forecast period to 2036.

20.41 On this basis, the available expenditure has been projected forward to 2036 and any residual expenditure available to support new A3-A5 floorspace over the development plan period will be derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels and the growth in 'benchmark' turnovers after applying robust year-on-year 'productivity' ('efficiency') growth rates to all existing floorspace of 1% per annum.

20.42 The resulting residual expenditure has been converted into floorspace projections using a 2017 average sales density of £2,015 per sqm net and a higher assumed sales density of £5,000 per sqm net (both inflated by 1% per annum over the period to 2036). This reflects our judgement of the potential range of turnover levels achieved by food and beverage operators across the UK, based on the available evidence and market intelligence.

20.43 The analysis also takes into account the following extant commitments:

- Planning Ref: WP/14/01064/FUL: Brewers Quay, Hope Square, Weymouth. Alterations and conversion of existing building to provide a museum; wet weather/ exhibition space and cultural experience space; 4 Class A1/A3 units; 35 Class C3 residential units and other associated works. Assumed A3 floorspace proposed of 465 sqm net.
- Planning Ref: WD/D/16/002733: Charlestown Service Station, Chickerell Road, Chickerell, Weymouth. Part demolition of, and alterations and extensions to, the existing petrol filling station/car workshop/retail unit to provide a convenience retail store (Class A1), a second retail unit (Class A1) and a takeaway

(Class A5) together with the provision of car parking, a service area and associated development (revised scheme to application WD/D/16/0829). Assumed A5 space proposed of 112 sqm net.

- Planning Ref: WD/D/16/001603: Land at Chickerell Link Road, Chickerell, Weymouth. Full application for the erection of a Class A1 foodstore (1,804 sq m gross) with associated access, car parking and landscaping. Outline application for up to 500 sq m of Use Class A1 to A5 floorspace on land to the north of the ALDI store. Assumed A3-A5 space of 350 sqm net.
- Planning Ref: WD/D/15/00047: Land to rear of South Terrace, South Street, Dorchester. Three storey mixed use development comprising 2 retail units (A1/A2/A3) and 4 self-contained one bedroom flats. Assumed A3 space of 28 sqm net.
- Planning Ref: WD/D/16/001406: Peel Centre Retail Park, Babylon Hill, Yeovil. Erection of an ancillary pod building incorporating 2 no. A1/A3/A5 use units. Assumed A3-A5 space of 145 sqm net.

20.44 The table below summarises the high level capacity forecasts for new Class A3-A5 floorspace on this basis.

Table 20.11: Need for new Food & Beverage Space in the Study Area – Projected Gross Floorspace (sqm)

	2021	2026	2031	2033	2036
Total Available Expenditure in Study Area (£m)	326.7	362.6	392.1	408.2	433.4
Current retained turnover (£m)	270.5	300.2	324.7	338.0	358.8
Benchmark turnover (£m)	257.5	270.6	284.4	290.1	298.9
Net Residual Excluding Commitments (£m)	13.0	29.6	40.3	47.9	59.9
Turnover of Committed Floorspace (£m)	5.6	5.9	6.2	6.4	6.5
NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: (£m)	7.4	23.7	34.0	41.5	53.3
Capacity (sq m gross) based on a sales density of: £5,000/sqm net	2,020	6,195	8,457	10,113	12,610
Capacity (sq m gross) based on a sales density of: £2,015/sqm net	5,013	15,373	20,985	25,094	31,290

Note: Gross to net ratio applied of 70%

20.45 Assuming 'equilibrium' at the base year and constant market shares over the forecast period, we forecast capacity for between 2,020 sqm gross to 5,013 sqm gross in 2021 increasing to between 12,610 sqm gross and 31,290 sqm gross by 2036.

20.46 In compliance with the objectives of the NPPF, this forecast need should be directed to town centres within the three Council areas first to help increase competition and choice, and to help underpin their daytime/evening economies.

20.47 We have further disaggregated the forecast capacity for each of three Council areas and this is detailed in **Table 20.12**.

Table 20.12: Eating & Drinking Out – Projected Gross Floorspace Disaggregated by LPA (sqm)

LPA	Estimated Average Sales Density	2021	2026	2031	2033	2036
Weymouth & Portland	£5,000 per sqm	-214	1,086	1,791	2,306	3,084
	£2,015 per sqm	-531	2,695	4,443	5,722	7,652
West Dorset	£5,000 per sqm	1,644	3,828	5,011	5,877	7,183
	£2,015 per sqm	4,078	9,498	12,434	14,583	17,824
North Dorset	£5,000 per sqm	590	1,281	1,656	1,930	2,343
	£2,015 per sqm	1,465	3,180	4,108	4,788	5,813
TOTAL	£5,000 per sqm	2,020	6,195	8,457	10,113	12,610
	£2,015 per sqm	5,013	15,373	20,985	25,094	31,290

20.48 This forecast need for the three local authority areas is as follows:

- **Weymouth & Portland:** no capacity in the short term to 2021, but growth thereafter to between 1,086 sqm – 2,695 sqm gross by 2026 and to between 3,084 sqm gross and 7,652 sqm gross by 2036;
- **West Dorset:** capacity for between 1,644 sqm – 4,078 sqm gross by 2021, increasing to between 7,183 sqm – 17,824 sqm gross by 2036; and
- **North Dorset:** capacity for between 590 sqm - 1,465 sqm gross by 2021, increasing to between 2,343 sqm – 5,813 sqm gross by 2036.

20.49 As for the assessment of need for retail and all commercial leisure uses, the forecast capacity for new cafés, restaurants and bars is highly dependent on the level of market demand and confidence in town centres as trading locations. In simple terms the more successful, vital and viable a centre is, the more likely it will be that café and restaurant operators will want to locate there. As the analysis has shown there is already a relatively strong demand and retention from within the catchment. As such, we consider that the forecast need should focus on qualitative improvements across centres, principally where there is lower provision and choice of places to eat and drink.

Health & Fitness Need

20.50 The health and fitness market has generally performed well during the economic downturn. The latest statistics from the *Leisure Database Company*⁴⁷ (LDC) show that over the twelve month period to March 2016, the industry has grown its total market value by +5.3% to £4.4 billion, and its member base has also grown by +5.3%. According to LDC there were an estimated 6,435 private health clubs and public fitness centres facilities in the UK in 2016, which represented a small +1.9% net increase from 6,312 facilities the previous year. The main operators in the market currently include:

⁴⁷ LDC is a market research specialist for the leisure industry

- Esporta, Greens & David Lloyd Leisure – at the premium end of the market focus on health, racquet and tennis clubs;
- Nuffield Health (previously Cannons) & Virgin Active – dominate the mid-range family-orientated health; and fitness market (Nuffield acquired 35 Virgin Active gyms in 2016);
- LA Fitness, Fitness First and Bannatyne's Health Clubs – operate smaller in-centre clubs at the more value end of the market; and
- Within London smaller 'boutique' gyms are popular, such as Soho Gyms, which have facilities across the City.

- 20.51 The most significant growth in the sector in recent years has been fuelled by value and budget operators. The new wave of ("*no frills*") fitness clubs is growing steadily and lead by Pure Gym, which opened 60 clubs across the UK in 2015. Other popular low cost brands include EasyGym, Fitness 4 Less, Fitspace, TruGym, and SimplyGym. The low cost business models is based on 24-hour opening, discounted monthly subscriptions (of between £10 and £20 on average) and '*pay as you go*' membership. According to LDC, the low cost gym sector now accounts for 12% of total private clubs and 32% of private sector membership.
- 20.52 Overall, the proportion of the population in 2016 with a gym membership was estimated at 14.6%, up from 13.7% in 2015. According to LDC, the average number of members per club in the UK is estimated to be 1,426, which includes the average for independent venues (726 per club) and larger leisure chains (2,198 per club). For the larger fitness chains (e.g. David Lloyd, Virgin, LA Fitness, etc.) the average club membership increases to 2,897, while budget chains are even higher at 3,452 members⁴⁸.
- 20.53 **Table 20.13** summarises the current representation of the main national, regional, independent, privately-owned health and fitness operators as well as Council-owned leisure centres across the three LPA areas. The table shows a good representation of national multiple operators within the study area, alongside a number of independent facilities, which are supplemented by public sector facilities.

⁴⁸ Sourced from the 2014 State of the UK Fitness Industry, the Leisure Database Company.

Table 20.13: Leisure Centres and Fitness Clubs

Type	Local Authority	Name	Private Sector	Public Sector	Community Trust
Leisure Centre	West Dorset	B-Fit Community Sports Hall and Swimming Pool		√	
		Bridport Leisure Centre		√	
		1610 Dorchester Sports Centre		√	
		Fit School		√	
		Gryphon Sports Centre		√	
		Oxley Sports Centre		√	
		Saint Osmunds Community Sports Centre		√	
		Sherborne Sports Centre		√	
	North Dorset	Blandford Leisure Centre		√	
		RiversMeet Gillingham			√
	Weymouth and Portland	Weymouth Swimming and Fitness Centre		√	
		Osprey Leisure Centre, Portland			√
		Redlands Community Sports Hub		√	
		Weymouth College Community Sports Centre		√	
Fitness Centre	West Dorset	Anytime Fitness Dorchester, Dorchester	√		
		Physiques & Shapes Health Club, Dorchester	√		
		Dorchester Health & Fitness Ltd, Dorchester	√		
		Dorchester Strength and Conditioning, Dorchester	√		
		Charlton Down Health & Fitness Centre	√		
		New Body Fitness, Bridport	√		
		B Health & Fitness, Lyme Regis	√		
		California Fitness, Lyme Regis	√		
		SPFit, Sherborne	√		
		Fitness By Design, Gillingham	√		
	North Dorset	The Toning Suite, Gillingham	√		
		BMV Health and Fitness, Shaftesbury	√		
		Sturfit, Sturminster Newton			√
		Pete's Functional Fitness Club/Gym, Sturminster Newton	√		
		R Lukins Fitness, Pimperne	√		
		New Body Fitness, Weymouth	√		
	Weymouth and Portland	Pulse Health & Fitness, Weymouth	√		
		Fitness World, Weymouth	√		
		Sam Wilson Fitness, Weymouth	√		
		Fitness for Life Sports Centre, Weymouth	√		
		Future Physiques, Weymouth	√		
		Mission Fitness, Weymouth	√		
		3d Health & Fitness Wey Valley	√		

Source: Carter Jonas Research

20.54 In addition to the above we have been informed by West Dorset council that there are currently two schemes with extant planning permission that will add to the current provision:

- **Planning Ref: WD/D/16/000838 - St Andrews Trading Estate, Shoe Lane, Bridport:** Change of use from B2 general industrial to D1 (creche / day nursery) and D2 leisure (indoor sports and recreation together with ancillary cafe facility). This is anticipated to add some 1,830 sqm gross of additional space.
- **Planning Ref: WD/D/17/000936 – Leanne House, Avon Close, Granby Industrial Estate, Chickerell:** Change of use of west wing from offices (B1 Use) to gymnasium (Use D2). Change of use of east wing

from offices (Use B1) to part offices (Use B1) & part clinic, health centre & creche (Use D1). This is anticipated to add some 1,698 sqm gross of additional space.

- 20.55 In terms of fitness/health activity participation rates, the household survey results show that 16.6% of respondents in the study area visited a gym, health club or sport facility. Of these, 58.4% of respondents from the study area visited more than once a week and 28.0% visited once a week. The most popular leisure facilities are:
- **Blandford Leisure Centre:** which is achieving a market share of 11.5% from the study area (0.0% from the West Dorset area; 36.4% from the North Dorset area; and 0.0% from the Weymouth and Portland area);
 - **Dorchester Sports Centre:** which is achieving a market share of 8.2% from the study area (16.9% from the West Dorset area; 0.0% from the North Dorset area; and 0.0% from the Weymouth and Portland area);
 - **Bridport Leisure Centre:** which is achieving a market share of 7.7% from the study area (15.7% from the West Dorset area; 0.0% from the North Dorset area; and 0.0% from the Weymouth and Portland area); and
 - **Active Fitness in Weymouth:** which is achieving a market share of 6.2% from the study area (1.1% from the West Dorset area; 0.0% from the North Dorset area; and 30.3% from the Weymouth and Portland area).
- 20.56 In terms of improvements to the leisure offer, 2.0% of respondents from the study area suggested they need more and/or better health clubs/gyms, and 4.1% stated that they would like a swimming pool. This would appear to indicate that there is demand for additional swimming pool provision.
- 20.57 In terms of the need for new health club/ gym facilities, applying the participation rate for gym and health club activities identified for the study (16.6%) results to the projected growth in the study area population of 41,317 up to 2036 will result in some 6,858 potential new gym members over this period. Based on average membership levels for key commercial gym operators such as David Lloyd and LA Fitness (which average 2,897 average members per facility) or a budget gym (which 3,452 average members per facility) this could potentially support up to 2 private gyms, or alternatively 2 budget gyms over the forecast period. However, it should be noted that this assessment of need does not take account of the two schemes with extant planning permission which will potentially absorb the identified capacity.
- 20.58 Notwithstanding the forecast quantitative need, if market demand does arise from gym operators seeking representation in the study area and its main centres, then this should be directed to town centres first in accordance with national and local plan policy objectives.

Bingo & Gambling Needs

- 20.59 Gambling represents a significant element of the leisure industry. The main sectors of the gambling industry comprise 'games of chance' (i.e. bingo clubs, casinos, betting shops, amusement arcades, etc.). We briefly describe the key trends in this sector and the forecast need/demand for new facilities in the study area, if any, based on the available evidence.
- 20.60 In terms of **Bingo Halls**, the latest research by The Gambling Commission (Industry Statistics November 2015) indicates that there are over 599 licensed premises in operation in the UK, which is a reduction from 653 recorded in 2014. Gala Leisure and Mecco Bingo are the leading operators accounting for over a third (36.9%) of all premises. Research by Mintel indicates that the industry has experienced a fall in revenues and

admissions over recent years as a result of legislative changes (such as the ban on smoking in public places), the impact of the economic downturn and the growth of online gaming. In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smart-phone technology through new 'app' development. This forms part of a wider trend and growth in 'remote/online' gambling, which include gambling activities through the internet, telephone, radio, etc. Bingo operators are also increasingly looking to diversify their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes. The above has resulted in the closure of many bingo halls across the UK.

- 20.61 For **Casinos** research shows that there were some 147 in the UK in September 2015. The number of premises has remained fairly static over the past five years⁴⁹. This sector is dominated by two companies: the Rank Group (incorporating Grosvenor Casinos and Gala Coral Casinos) and Genting UK. There has been consolidation of the sector in the past few years, with acquisitions such as Rank Group's purchase of Gala Coral Casinos making it the largest operator in the UK. While casino attendance has grown from 18.24m in 2012 to 20.44m in 2015, attendance dropped by 2.6% from 2014 (20.99m). The increase in attendance since 2012 is largely explained by larger new casino venues granted licences under the 2005 Gambling Act. As far as we are aware there is no casino facility located within the three LPA areas. The nearest commercial casinos are in Bournemouth namely the Genting and Grosvenor Casino(s).
- 20.62 **Betting shops** do represent a growing market in the gambling sector and are ever present on the UK's high streets. There are approximately 9,000 betting shops in the UK, of which around half are operated by Ladbrokes and William Hill. Regulatory changes in 2015 led to a fall in revenue and profit. In response, William Hill announced their intention to close 150 of their 2,300 outlets. As gambling activities continue their shift to online channels, demand for physical outlets could dampen in the future. The presence of betting shops in high streets is a contentious issue, particularly the perceived social issues that are linked to this particular activity (e.g. anti-social behaviour) and their concentration in deprived areas. The Government has recognised that betting shops have specific impacts and in 2016 reclassified betting shops from A2 to Sui Generis use. This reclassification gave local authorities greater control on managing the number of outlets and therefore greater potential to limit impacts associated with betting shops.
- 20.63 The household survey results indicate that visiting bingo halls, casinos and/or bookmakers is not a major leisure activity for the majority of respondents living within the study area since only 2.7% of respondents stating that they visit these facilities. Of those that do partake, 35.4% of respondents from the study area visit once a week and 14.6% visit more than once a week. 36.1% of respondents from the study area visit once every two months and 20.0% visit once a month. Only 7.0% indicated that they frequent this activity once a week. The household survey indicates that the most popular venues include the Gala Bingo on Crescent Street in Weymouth (15.7%), Weymouth Town Centre (12.7%) and Blandford Forum Town Centre (12.2%).
- 20.64 In our judgement, there is no demonstrable need to enhance existing provision to improve competition and choice at the local level, although this will be subject to market interest and demand from other bingo and casino operators. If demand arises in the future, we advise that this should be directed to the town centres first in accordance with national and local plan policy. Given that current trends for bingo halls and casinos show activity moving online instead of physical venues, future demand for new venues is expected to be very limited.

⁴⁹ Source: Gambling Commission Industry Statistics 2016.

- 20.65 Finally, in response to the question as to what improvements could be made to the commercial leisure offer that would encourage people to participate in more leisure activities, only 0.1% of respondents to the household survey stated that they would like a casino and only 0.1% of respondents from the study area stated that they would like a bingo hall. These findings further demonstrate the lack of demand for bingo and gambling facilities in the three Council areas.

Other Commercial Leisure Needs

- 20.66 Other commercial leisure facilities can be grouped together under 'family entertainment' venues which include paid activities that appeal to adults and children; such as, for example, ten-pin bowling, roller skating, ice skating, and similar uses.
- 20.67 **Ten-pin bowling** is possibly the most popular of this category and has been established as a commercial leisure activity in the UK for over 40 years. It remains a strong family and group activity. Research shows that there are currently over 321 bowling centres in the UK⁵⁰. This sector benefitted from a period of growth from the mid-1990s onwards, fuelled by the development of large entertainment 'boxes' and leisure parks at one end of the spectrum, and smaller independent specialist bowling facilities at the other end. A number of the successful bowling facilities opened over the last 15-20 years tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. It is the critical mass of leisure uses under one roof or as part of leisure parks that helps to underpin the viability of ten-pin bowling centres, which can struggle as standalone attractions. Examples of the smaller specialist operators include All Star Lanes which operates five bowling venues in the UK (four in London and one in Manchester) and largely targets the corporate/private hire market. Bloomsbury Bowl Lanes also operates from smaller venues with sites in Bloomsbury (8 lanes) and Bristol (5 lanes). The company offers a 1950's American-themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.
- 20.68 There is one main ten-pin bowling facility located in the three Councils area namely MFA Bowl on St. Nicholas Street in Weymouth. There is also a bowling facility located at Freshwater Holiday Park in Bridport.
- 20.69 There are a number of family and tourist attractions located in Abbotsbury which is situated in West Dorset district. These include a subtropical garden, swannery and a farm.
- 20.70 Other family activity venues in the Councils area include those detailed in **Table 20.14**. The household survey indicates that 14.6% of respondents from the study area partake in family entertainment activities. Family activities are carried out less frequently than other leisure activities, with 38.7% of respondents carrying out family 'activities' once every six months, and 22.9% once every two months. Only 4.9% of respondents visit family attractions once a fortnight and 1.8% visit once a week.
- 20.71 As shown below, MFA Bowl in Weymouth is the most popular venue across the study area, followed by Freshwater Holiday Park 10 Pin Bowling in Bridport, and Kingston Maurward Animal Park in Dorchester.

⁵⁰ Tenpin Bowling Market UK, Mintel (November 2012)

Table 20.14: Family Entertainment Venues

Location	% Visit from Study Area	% Visits from W Dorset (Zones 3-9)	% Visits from N Dorset (Zones 10-12)	% Visits from Weymouth & Portland (Zones 1-2)
MFA Bowl, Weymouth	29.2%	23.0%	0.0%	73.5%
Freshwater Holiday Park 10 Pin Bowling, Bridport	6.7%	14.8%	0.0%	0.0%
Kingston Maurward Animal Park, Dorchester	2.1%	4.9%	0.0%	0.0%
Sharky's Play and Party Warehouse, Weymouth	1.7%	0.0%	0.0%	5.9%
Sealife, Weymouth	1.3%	3.3%	0.0%	0.0%
Weymouth Pavilion, Weymouth	1.3%	0.0%	0.0%	5.9%
Granby Fun Factory, Weymouth	1.0%	1.6%	0.0%	0.0%
Coolplay, Sturminster Newton	1.0%	0.0%	2.5%	0.0%
Climb Aboard, Gillingham	0.8%	0.0%	0.0%	0.0%
Crazy Monsters, Blandford Forum	0.7%	0.0%	0.0%	0.0%
Abbotsbury Swannery, Abbotsbury	0.4%	5.5%	0.0%	0.0%
Lyme Regis Marine Aquarium, Lyme Regis	0.0%	0.0%	0.0%	0.0%
Alexandra Gardens Pleasure Grounds, Weymouth	0.0%	0.0%	0.0%	0.0%

Source: HTIS 2017

- 20.72 In response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more in leisure activities, 4.1% of respondents in the study area stated that they would like more facilities for children, and 1.5% stated tenpin bowling. As such, in terms of future needs, the study area could benefit from a wider range of family activities. The potential for new family activity venues will however be subject to market demand and should be directed to town centre locations.

Cultural Activities

- 20.73 Cultural activities include a broad range of activities that are focused on the arts and historic attractions. For the purpose of this assessment, consideration is given to the provision of theatres, music venues, and historic/cultural attractions across the Council areas. Current cultural venues (including theatres, music venues, museums, and art galleries) include those set out in the table below:

Table 20.15 Key Cultural Venues in the Councils Area

Venue Type	Local Authority	Name
Theatre and Music	West Dorset	The Lyric Theatre, Bridport Electric Palace, Bridport Bridport Arts Centre, Bridport The Marine Theatre, Lyme Regis Dorchester Arts Centre, Dorchester The Powell Theatre, Sherborne
	North Dorset	The Exchange, Sturminster Newton Shaftesbury Arts Centre, Shaftesbury
	Weymouth and Portland	Weymouth Pavilion, Weymouth Royal Manor Theatre, Portland
Museum	West Dorset	Beaminster Museum, Beaminster Bridport Museum, Bridport Dinosaurland Fossil Museum, Lyme Regis Dorset County Museum, Dorchester Dorset History Centre, Dorchester Lyme Regis Museum, Lyme Regis Sherborne Museum, Sherborne Teddy Bear Museum, Dorchester Terracotta Warrior Museum, Dorchester The Dinosaur Museum, Dorchester The Keep Military Museum, Dorchester
	North Dorset	Gillingham Museum, Gillingham Gold Hill Museum, Shaftesbury Royal Signals Museum, Blandford Forum Sturminster Newton Museum, Sturminster Newton The Blandford Fashion Museum, Blandford Forum The Blandford Town Museum, Blandford Forum
	Weymouth and Portland	Castletown D-Day Centre, Portland Grove Prison Museum, Portland Portland Museum, Portland Weymouth Museum
Art Gallery	West Dorset	West Bay Gallery, Bridport Gallery on the Square, Poundbury The Bairstow Gallery, Dorchester Jarram Gallery, Sherborne D'Veitch Art Gallery, Abbotsbury Dansel Gallery, Abbotsbury
	North Dorset	Shaftesbury Arts Centre, Shaftesbury The Valentine Gallery, Blandford Forum
	Weymouth and Portland	Gallery on the Wey, Weymouth Cove Gallery, Weymouth

Source: Carter Jonas Research

- 20.74 Cultural venues in the three Councils area are extensive, particularly within West Dorset generally and Dorchester in particular.
- 20.75 The results of the household survey indicate that 21.3% of respondents from the study area visit museums, galleries and place of historical or cultural interest (23.6% visit in West Dorset; 18.1% visit in North Dorset; 20.4% visit in Weymouth and Portland). Theatres, concerts and music venues are even more popular with some 29.4% of respondents taking part in these activities (26.4% visit in West Dorset; 28.1% visit in North Dorset; 37.5% visit from Weymouth and Portland).
- 20.76 The household survey confirms that this form of activity is carried out infrequently, with the majority (30.5%) of respondents visiting places of cultural interest once every six months, and the majority (36.1%) visiting theatres, concerts or music venues also once every six months, from within the study area.
- 20.77 In terms of places of cultural interest, from the study area, the most popular attractions are:
- Dorset County Museum, Dorchester, which attracts 20.5% of those visiting cultural and historic venues;
 - Bridport Museum, Bridport, which attracts 6.0% of respondents; and
 - Weymouth Museum, Weymouth, which attracts 5.2% of respondents.
- 20.78 With regard to theatres and music venues, the most popular attractions across the study area are:
- The Weymouth Pavilion, Weymouth, which attracts 25.7% of those visiting theatres and music venues; and
 - Bridport Arts Centre, Bridport, which attracts 4.7% of respondents.
- 20.79 As such, it is clear that the range of venues and facilities of cultural interest are numerous and varied across the study area, and this contributes significantly to the broad visitor economy of the area.

Hotel Provision

- 20.80 Hotel provision across the study area is largely focused within West Dorset and Weymouth & Portland. This is due to the number of visitor and tourist locations within these Council areas in comparison to North Dorset. As a result of the high number of hotels across the study area, we have compiled a list of a selection of hotels based on available information as set out in the table below.

Table 20.16 Hotel Provision Across the Study Area

Local Authority	Name
West Dorset	<p>Wessex Royale Hotel, Dorchester</p> <p>Premier Inn, Dorchester</p> <p>Junction Hotel, Dorchester</p> <p>Beggars Knap B&B, Dorchester</p> <p>The Duchess of Cornwall Inn, Poundbury</p> <p>The Bull Hotel, Bridport</p> <p>Court House, Bridport</p> <p>Bridge House Hotel, Bridport</p> <p>Haddon House Hotel, West Bay</p> <p>Clovelly Guest House, Lyme Regis</p> <p>Mariners Hotel, Lyme Regis</p> <p>Dorset House, Lyme Regis</p> <p>The Mitre Inn, Sherborne</p> <p>Britannia Inn, Sherborne</p> <p>The Eastbury Hotel, Sherborne</p> <p>Bridge House, Beaminster</p>
Weymouth & Portland	<p>Premier Inn Seafront, Weymouth</p> <p>Premier Inn, Weymouth</p> <p>Best Western, Weymouth</p> <p>The Crown Hotel, Weymouth</p> <p>Riviera Hotel, Weymouth</p> <p>Whitecliff Guest House, Weymouth</p> <p>The Nook, Weymouth</p> <p>Royal Breakwater Hotel, Portland</p> <p>The Heights Hotel, Portland</p>
North Dorset	<p>The Crown Hotel, Blandford Forum</p> <p>Three Ivy Cross, Shaftesbury</p> <p>The Grosvenor Arms, Shaftesbury</p> <p>Number 5, Shaftesbury</p> <p>The Swan Inn, Sturminster Newton</p>

Source: Carter Jonas Research

- 20.81 There is generally a good provision of overnight accommodation available in Weymouth town centre. This includes hotels served by national and independent operators, local B&Bs, apartments both within the centre and outside of the centre and holiday parks comprising camping and caravans on the outskirts of the centre.

- 20.82 There are also concentrations of hotels and other accommodation types in and around the coastal towns in West Dorset, including Lyme Regis and Bridport (including West Bay). There are fewer hotels in North Dorset. We consider that this is potentially due to the smaller size of centres across the Council area and the fact that its centres are not located on the coast.
- 20.83 In summary, we consider that the three Council areas are well served by a range of national and independent operators. Notwithstanding this, as the broader study area is an important tourist destination, it is important that the constituent Councils consider marketing and promoting the attractions to help draw all-year trips to these venues. In this way there may be potential opportunities for growth in this sector. We therefore recommend that the Council undertake an assessment of the current supply of hotel rooms, occupancy rates and revenue generated (RevPAR) to get an understanding of current performance and any potential for growth.

Conclusion

- 20.84 Our review of the commercial leisure sector focuses on updating the quantitative need for new cinema screens, food and beverage provision, and health and fitness facilities.
- 20.85 The commercial leisure industry faces considerable challenges and pressures. It is clear that consumers are becoming increasingly selective in terms of how they spend their discretionary leisure time. There will also be a continued increased in at-home activities due to advances in computers, tablets, television, gaming, and audio technology. The challenge for town centres and leisure operators in the future is to attract customers away from their homes.
- 20.86 Our review of the commercial leisure sector and offer across the three Council areas and the results of the household survey indicate that there is broadly a good provision of leisure facilities.
- 20.87 In terms of cinema provision, the assessment found that a high proportion of respondents frequently visit the cinemas within the study area. Retention levels from within the study area are high. The quantitative assessment identified no additional capacity until 2036, but we consider there is potential for one and possibly three cinema screen in North Dorset, subject to market demand. Where market demand from cinema operators does exist, this should be directed to main town centres first in accordance with national and local plan objectives.
- 20.88 The total available expenditure for food and drink is set to increase by +45% (£134.5m) over the plan period to 2036. This growth results in the cumulative potential floorspace capacity of between 12,610 sqm gross and 31,290 sqm gross by 2036. The prospect for new facilities is however ultimately dependent upon the level of market demand and interest.
- 20.89 There is also a strong provision of health and fitness facilities. The population growth up to 2036 could potentially support up to 2 additional gyms/health club facilities; subject to market demand.
- 20.90 In terms of addressing future needs, we consider that some of the larger centres in the study area (principally Dorchester and Weymouth) could benefit from a wider range and quality of family venues and activities.
- 20.91 The study area generally benefits from a diverse cultural and tourist attractions, which contribute significantly to the visitor economy of the area. These need to be maintained and promoted in order to attract further visitors to the area and to help attract all-year trips.

20.92 In terms of hotel provision, the area is well served by a range of national and independent operators. Notwithstanding this, to help maintain and enhance the visitor and tourist economy across the study area and its main centres, the respective LPA's should proactively seek to increase hotel and visitor/tourist accommodation in the main centres, subject to market demand. To further help inform the proactive planning and development of new accommodation we recommend that a more detailed hotel needs assessment be commissioned.

21 NORTH DORSET - KEY FINDINGS & RECOMMENDATIONS

- 21.1 This final section provides a summary of the key findings of the *Joint Retail and Commercial Leisure Study* that are relevant to plan-making and decision-taking in the North Dorset local authority area. It sets out high level advice on how the Council can effectively plan for, manage and promote the vitality and viability of its main centres over the development plan period; namely Blandford Forum, Gillingham, Shaftesbury, Sturminster Newton and Stalbridge.
- 21.2 Our advice is informed by the updated quantitative and qualitative need assessment new retail (comparison and convenience goods) floorspace and commercial leisure uses up to 2036. The need assessment draws on a robust and up-to-date evidence base and new primary research, including:
- A health check of the main centres;
 - A telephone interview survey of some 1,200 households across a widely defined Study Area – that includes the North Dorset, West Dorset and Weymouth and Portland Council areas - to help establish current shopping patterns, leisure preferences, market shares and turnover levels.
 - Wide-ranging engagement with key stakeholders with a vested interest in the planning, management, development and performance of the main centres, including a stakeholder workshop held on January 9th 2018.
- 21.3 The study has been prepared in the context of national and development plan policy guidance, as well as other key material considerations. This includes the *National Planning Policy Framework* (NPPF) and the *Planning Practice Guidance* (PPG), which place weight on the development of positive plan-led visions and strategies for town centres, and promote new investment and development in town centres first ahead of edge and out of centre locations.
- 21.4 Based on the key evidence and findings of this study, this section provides a brief summary of:
- each centres' relative health, role and function, and any potential (qualitative) weaknesses and/or 'gaps' in their retail and leisure offer;
 - the quantitative need (or 'capacity') for new retail (convenience and comparison goods) floorspace and other main leisure and town centre uses over the plan period;
 - a high level assessment of the availability and suitability of in-centre, edge and out of centre opportunity sites identified by the respective local planning authorities to accommodate the forecast quantitative and qualitative need for new retail floorspace and leisure uses over the plan period (where a need has been identified);
 - the setting of a reasonable and robust impact 'threshold' in accordance with the NPPF (paragraph 26) and PPG that will allow the Council to assess and understand any likely impacts from new edge and out of centre applications on the vitality and viability of each main centre;
 - recommendations for primary and secondary shop frontages, as well as the definition (where appropriate) of a suitable Primary Shopping Area (PSA); and
 - recommendations for maintaining and/or changing the current definition of the retail hierarchy to better reflect existing and future shopping and trading patterns, and the potential for new development.

- 21.5 By way of explanation, the assessment of the potential for the identified development opportunity sites in each centre to meet the forecast scale and type of new retail, leisure and other town centre uses needed over the plan period has been carried out in accordance with the sequential approach set out in the NPPF (paragraph 23) and PPG. In brief, as described in Section 2, the sequential test guides main town centre uses towards town centre locations first, then, if no town centre locations are available, to edge of centre locations⁵¹, and, if neither town centre locations nor edge of centre locations are available, to out of town centre locations; with preference for accessible sites which are well connected to the town centre. This test is important as it supports the viability and vitality of town centres by placing existing town centres foremost in both plan-making and decision-taking. In plan-making, the sequential approach requires a thorough assessment of the suitability, viability and availability of locations for main town centre uses. It also requires clearly explained reasoning if more central opportunities to locate main town centre uses are rejected. The NPPF (paragraph 23) is clear that it is important that needs “...are met in full and are not compromised by limited site availability”, and it advises that local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites.
- 21.6 It is against this background that we set out below our main findings and recommendations to help inform plan-making in North Dorset, specifically focusing on positive policies that will help with the management and growth of competitive town centres over the plan period in compliance with the NPPF.

Retail and Leisure Needs Assessment

- 21.7 **Section 19** assessed the overall quantitative need ('capacity') for new retail (convenience and comparison goods) floorspace in North Dorset and its main centres/stores over the development plan period, up to 2036.
- 21.8 The retail capacity assessment is informed by CJ's **CREAT[®]** Capacity Model. This model has been designed and developed by CJ over a number of years to help identify the need for new retail floorspace and to test the impact of new floorspace on the trading/turnover performance of existing centres and stores.
- 21.9 The retail capacity assessment is underpinned by robust evidence (principally the household survey) and forecasts (sourced from Experian Business Strategies and the Councils). In line with standard approaches, the capacity forecasts assume that the retail market is in '*equilibrium*' at the base year (2017) and that market shares remain constant over the study period.
- 21.10 It is important to restate at this point that capacity forecasts beyond five years should be interpreted with caution. This is because they are based on various layers of assumptions and forecasts with regard to changes in the national and local economy; the trading performance of existing centres and stores; the growth in population and retail spending; etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could further 'dampen' the future demand and capacity for new (physical) floorspace over the long term. The Council should therefore take into account these margins for error when assessing the need for new retail floorspace over the medium term (5-10 years) and long term (10 years plus), and should regularly review and 'refresh' the forecasts to take account of changes in the baseline assumptions and forecasts.
- 21.11 The tables below summarise the forecast need for new convenience and comparison goods (net) floorspace over the plan period, up to 2036.

⁵¹ By way of clarification the NPPF explains in the Glossary (Annex 2) that for retail purposes, edge-of-centre is defined as a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.

Table 21.1: North Dorset DC: Convenience Goods Capacity (Net) by Locations – New Superstore Format (sqm)

	2021	2026	2031	2033	2036
Blandford Forum	58	135	165	191	232
Gillingham	271	617	846	967	1,151
Shaftesbury	136	206	237	274	329
Sturminster Newton	44	115	163	186	221
Stalbridge	19	31	37	43	52
All smaller villages/local centres	7	15	18	21	26
All Out-of-Centre	-582	-394	-303	-239	-141
TOTAL NORTH DORSET LPA - CONVENIENCE GOODS CAPACITY	-47	725	1,164	1,443	1,870

Table 21.2: North Dorset DC: Comparison Goods Capacity (Net) by Locations (sqm)

	2021	2026	2031	2033	2036
Blandford Forum	493	1,307	1,863	2,183	2,682
Gillingham	202	537	765	897	1,102
Shaftesbury	317	842	1,200	1,406	1,727
Sturminster Newton	118	314	448	525	645
Stalbridge	22	57	81	95	117
All smaller villages/local centres	5	12	17	20	25
All Out-of-Centre	-1,934	-1,874	-1,833	-1,810	-1,773
TOTAL NORTH DORSET LPA AREA WIDE COMPARISON GOODS CAPACITY	-777	1,196	2,541	3,317	4,524

- 21.12 For **convenience goods** ('superstore format') floorspace only, the table shows that there is no District-wide capacity over the short term (between 2017 and 2021) after taking account of all known commitments. The capacity increases thereafter to 725 sqm net by 2026, 1,164 sqm net at 2031 and 1,870 sqm net by 2036.
- 21.13 For **comparison goods** the table shows that there is also no District-wide capacity over the short term (between 2017 and 2021) after allowing for all known commitments. The forecast capacity increases thereafter to 1,196 sqm net by 2026, 2,541 sqm net by 2031 and 4,524 sqm net by 2036.
- 21.14 We assess the ('disaggregated') capacity for new retail floorspace in the District's main centres and smaller local centres/villages in more detail below.
- 21.15 With regard to out-of-centre retailing, the retail assessment shows that there is no forecast (economic) capacity for new convenience or comparison goods floorspace over the plan period. However, this does not mean that there will be no market demand and/or applications for new out-of-centre retail floorspace. The Council will therefore need to put in place robust development management policies in accordance with the NPPF (paragraphs 24-27) that will enable the assessment and determination of any future applications that are not in a centre and not in accordance with an up-to-date development plan. Any future applications would need to satisfy both the sequential and impact tests, and any other material policies pertaining to specific sites and areas.
- 21.16 **Section 20** of this study broadly assesses the quantitative and qualitative need for new commercial leisure uses across the study area and three local authority areas, and identifies any significant 'gaps'. It is important to restate at the outset that forecasting the need for new commercial leisure uses is more complicated and problematic than for retailing. This is because the leisure sector is highly dynamic, and particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently the methods and approaches developed to forecast the need for new commercial leisure floorspace and uses are more wide-ranging and generally less sophisticated than for retail capacity forecasts. Furthermore, as for retail, the broad forecasts of the quantitative and qualitative need for new leisure uses and floorspace are highly dependent on market demand for representation in centres and areas. For example, just because there is a forecast (economic)

need or 'gap' in provision at the local level does not necessarily mean that commercial leisure operators will automatically have requirements, or be seeking space. Stimulating market demand will depend on a number of factors; ranging from marketing the opportunities, to providing the right sites/buildings, in the right locations at the right time that meet the needs of modern commercial leisure operators. These opportunities will most likely be in the form of mixed use highly sustainable developments, generally characterised by a range of retail, office, commercial leisure and residential uses.

21.17 Against this background, the leisure assessment for North Dorset has broadly identified the following needs:

- A potential need for up to 3 new cinema screens over the plan period. However this assumes an increase in the District's retention of cinema trips across the study area to 10%, and that the forecast need for 2 new cinema screens in West Dorset should be allocated to North Dorset to provide an optimum and more sustainable distribution of cinemas across the study area in planning terms. This will be subject to more detailed 'testing' of market demand from potential cinema operators for representation in North Dorset and its main centres.
- A potential need for between 2,343 sqm gross and 5,813 sqm gross of new food and beverage outlets (including cafés, restaurants, pubs and wine bars) up to 2036.
- A potential need for possibly one budget gym or health/fitness centre over the plan period; subject to market demand.
- The potential to improve the overall quality and offer of other commercial leisure uses, tourist/visitor accommodation (including hotels) and cultural attractions/facilities across the study area and its main centres, subject to market demand investment potential.

Blandford Forum

Needs Assessment

21.18 Blandford Forum is a traditional market town and is classified as a '*Town Centre*' in the North Dorset Local Plan Part 1. Overall our assessment has shown that it is fulfilling its important role and function in the District's network and hierarchy of centres. It is a vital and viable centre, with a good range of shopping and leisure facilities that principally serve the needs of its local catchment.

21.19 It is an attractive and historic centre that benefits from its Georgian architecture and well maintained shop fronts and streets. The majority of the retail and town centre uses are situated along West Street, Salisbury Street, Market Place and East Street. The health check and stakeholder engagement has identified that although the centre is easily accessible by car, there is a need for improvements to public transport provision.

21.20 Blandford Forum has a good provision of convenience and food stores. Its food offer is anchored by a Morrisons and Marks & Spencer, complemented by a number of smaller local independent stores; including bakeries, a butchers and greengrocer. There is also a strong out of centre convenience store provision with Tesco, Co-op and a recently opened Lidl store all situated within Blandford Forum. The good food offer in and around the town is reflected by the fact that there is limited forecast capacity for new convenience good floorspace over the plan period; 58 sqm net by 2021, increasing to 165 sqm net by 2031 and 232 sqm net by 2036. As highlighted in Section 19, this need could be met in full through the provision of a smaller convenience store, or an extension to existing stores (where possible), or possibly through change of use applications.

21.21 The town also has a good provision of national multiple and independent comparison goods retailers for a centre of its size. The centre's diverse mix of independent retailers make an important contribution to Blandford Forum's overall diversity, offer and attraction as a shopping location. The capacity forecasts have identified the greatest need for new comparison goods floorspace in Blandford Forum over the plan period to 2036 compared with the District's other main centres of Gillingham and Shaftesbury. The forecasts show a

requirement for 493 sqm net of new retail floorspace by 2021, increasing to 1,863 sqm net by 2031 and 2,682 sqm net by 2036.

- 21.22 Blandford Forum's food and non-food offer is further enhanced by the markets which take place in the Market Place, the Shambles and the Corn Exchange throughout the year. The street market is held twice per week and the indoor market takes place once per week.

Meeting Needs in Full – Development Opportunities

- 21.23 In terms of development opportunities in and on the edge of the town centre that could potentially accommodate the need for new comparison goods (2,682 sqm net) and convenience goods (232 sqm net) floorspace in full over the plan period up to 2036 in compliance with the NPPF (paragraph 23), along with other leisure and town centre uses, the local authority has identified the following two sites⁵²:

- Site 1: Land off Langton Road.
- Site 2: West Street.

- 21.24 The plans showing the extent of these sites are set out in **Appendix 20** to this report, along with our high level review of their suitability to accommodate new retail and mixed use development over the short (0-5 years), medium (6-10 years) and long term (11 years plus). Please note that our review of the availability and suitability of these sites at the time of preparing this study was informed by evidence provided to us by the local planning authority, site visits and other relevant information.

- 21.25 Based on our high level review of the opportunity sites we consider that the land off Langton Road (Site 1) has the greatest potential to accommodate new retail and leisure uses over the plan period. This relatively large site is located on the edge of the Conservation Area, and benefits from good pedestrian linkages to both the town's primary shopping area along East Street to the north of the site, and to Stour Meadows and the River Stour to the south of the site. In our view this attractive site would lend itself to comprehensive development to provide a mixed use retail and leisure scheme that maximises the park and river setting, and the connections to the town centre. However, the health check has identified that M&S is an important anchor to the town's overall food and convenience offer and, unless M&S is seeking to close this store as part of their wider store closure programme (and there is no evidence to indicate it is), we consider that it is highly unlikely that comprehensive development of the site will represent a viable option at this point in time. If this is the case, then the car park to the north of the site under the ownership of the Council could lend itself to smaller-scale development over the short to medium term. That said, the loss of essential car parking serving both the M&S and the wider town centre could make any potential redevelopment of the site unviable. Given these inherent uncertainties, we advise the Council to carry out a more detailed planning and development brief to help inform and guide the potential delivery of new retail and leisure uses on the site over the plan period.

- 21.26 Turning to the site at West Street (Site 2), this is a relatively small-scale development opportunity. The site is located in a more peripheral area away from the PSA and backs on to the Council-owned (pay-and-display) car park that serves both Morrisons and the wider town centre. On its own we consider that the site lends itself to a mixed use development; with limited retail, commercial leisure and/or community uses at ground floor level (i.e. Class A1-A5 and D2), and residential uses above (possibly over 2-3 floors and in keeping with existing buildings and surrounding uses). However, based on our desktop analysis and site visits, we consider that there could be potential for the Council to widen the West Street development opportunity site to include the more comprehensive redevelopment of the town centre car parks under its ownership to accommodate new retail development. However any redevelopment of this wider site would have to be sensitive to the future needs of Morrisons, and also the need to maintain and enhance the existing on-site parking which is

⁵² Both sites are identified as mixed use allocations in the draft Blandford + Neighbourhood Plan (Policies 5 & 6)

key to the town centre's overall vitality and viability. We therefore recommend that further work is undertaken to assess the overall suitability and viability of the wider site to accommodate new retail-led development, whilst retaining and potentially increasing the level of on-site parking. This could only be achieved through a multi-level scheme, which may be unviable in planning and commercial terms.

- 21.27 In summary, we advise that the comprehensive redevelopment of the land off Langton Road and the site at West Street (but including the Council-owned car parks) could meet the forecast need for new retail floorspace and leisure uses in full over the plan period. However, there are significant questions that need to be addressed with regard to the availability, suitability and viability of these sites for more comprehensive redevelopment, and the likely level of market interest and demand. For this reason we advise the Council that it should prepare planning and development briefs for both sites to help inform and guide their future development over the plan period.

Definition of Frontages and Primary Shopping Area

- 21.28 The *Blandford + Neighbourhood Plan 2015-2031* Submission Plan (2016) updates the boundary and frontages set out in the **2005 Annual Monitoring Report** and *North Dorset District-Wide Local Plan* (2003) as described in the health check.
- 21.29 The Town Centre Boundary (TCB), as defined within the *Blandford+ Neighbourhood Plan*, runs from the north of West Street along Market Place and Salisbury Street, to the end of East Street. Based on our health check assessment and site visits we consider the Town Centre Boundary definition is appropriate and robust in this case.
- 21.30 Although the *Blandford+ Neighbourhood Plan* does not define a Primary Shopping Area (PSA), it does set out the proposed revised frontages:
- Primary Shopping Frontages (PSF) - form an 'L' shape and are concentrated along the north of West Street, Salisbury Street and Market Place. The units along Barnacle Walk, including the Morrisons store are also defined within the PSF.
 - Secondary Shopping Frontages (SSF) - are located along East Street, West Street and Salisbury Street.
- 21.31 Based on our analysis we recommend that the extent of the PSF be contracted to exclude the units along West Street and along Salisbury Street. Instead we suggest these units should be better defined as being part of the SSF, to reflect the dominance of leisure and retail service uses along these streets rather than (Class A1) retail. We also suggest that the units along the western side of Barnacle Walk should be defined as SSF rather than being included within the PSF.
- 21.32 Furthermore, we suggest that the proposed SSF along Salisbury Street, as set out in the submission document, is removed due to the lack of town centre uses along this area of the street.
- 21.33 The defined PSA should broadly replicate the area of the PSFs and SSFs in compliance with the advice set out in the NPPF.

Gillingham

Needs Assessment

- 21.34 Gillingham is defined as a 'Town Centre' in the North Dorset Local Plan Part 1.
- 21.35 The town centre is relatively tightly bound, with the majority of retail and town centre uses situated along the more traditional High Street. To the south of the High Street there are a number of larger format foodstores and non-food retail units that have been developed in the area bounded by Le Neubourg Way and the River

Stour (including Waitrose) and along Station Road (including Asda, Iceland and Pets at Home) leading from the High Street to the cluster of retail and employment units in close proximity to the railway station.

- 21.36 Much of the town centre is situated within a Conservation Area and many of the buildings are of architectural merit, which limits the potential for new development. The centre also benefits from the attraction of the Town Meadow, which is a large area of green open space that is also used to host events throughout the year.
- 21.37 Any assessment of the quantitative and qualitative need for new retail, commercial leisure and town centre uses over the plan period also needs to take into account the southern extension of the town for approximately 1,800 new homes and new employment uses. Policy 21 of the Local Plan specifically deals with the Gillingham Southern Extension and states that it is critical for this to be achieved through a Masterplan Framework to enable comprehensive planning and development of the whole of the southern extension. The plans include provision of a new local centre to serve the day-to-day needs of the expanded population in this area.
- 21.38 Against this background our assessment has identified that, overall, Gillingham is fulfilling the basic needs of its town centre role and function in the retail hierarchy. However, there are a number of potential issues and weaknesses that we consider need to be addressed as a priority to ensure the centre remains vital and viable over the plan period, and meets the forecast growth in its population principally to the south of the town centre.
- 21.39 The health check assessment and audits have identified that Gillingham has a relatively good and diverse representation of food and convenience stores. Its main food offer is anchored by Lidl, Asda and Waitrose stores which respectively cater for the budget, mid-range and higher end food shopping needs of the local catchment population. Current provision is above the (Experian Goad) national average based on the scale of floorspace (although below the national average based on number of units). At the time of our health checks and audits of the centre the vacant Co-op store was due to reopen as a community centre.
- 21.40 The retail assessment has identified the capacity for 271 sqm net of new (*'superstore format'*) convenience goods floorspace by 2021, which could support a smaller convenience store. Capacity is forecast to increase to 967 sqm net by 2033 and 1,151 sqm net by 2036. This scale of need could support a smaller to medium sized store operated by one of the main national grocers not currently represented in the town (i.e. Morrisons, Tesco, Sainsbury's and M&S Simply Food). Alternatively, the forecast need for circa 1,842 sqm net of new *'supermarket/discounter format'* floorspace by 2036 could also support a second discounter in the town (i.e. Aldi). However, meeting this need for new convenience goods floorspace will be subject to firm market demand from any of these operators and others for representation in the town centre, and also satisfying the sequential and impact tests (NPPF, paragraphs 24-27) and other material policy considerations.
- 21.41 Overall we consider that Gillingham is under-performing as a comparison goods shopping destination in terms of the scale, range and quality of its overall offer. Although it has a relatively good mix and representation of independent retailers, its overall offer and multiple representation is relatively poor for a centre of its size, role and function in the District's network and hierarchy of centres. This most likely reflects the town's location in close proximity to the larger competing centres (such as Yeovil), which are major attractions for its local catchment population. Due to its more limited comparison goods offer the retail capacity assessment has also identified more limited capacity for 202 sqm net of new comparison goods retail floorspace by 2021, increasing to 765 sqm net by 2031 and 1,102 sqm net by 2036.
- 21.42 In our judgement the town centre's retail offer would also benefit from the introduction of a strong and well-managed street market that complements and strengthens the High Street's overall shopping offer. A street market would help to improve the town's attraction and overall vitality and viability, by providing a point of difference to other competing larger centres in the sub-region.

- 21.43 In terms of accessibility, it has been highlighted that there is a need to improve pedestrian linkages between the train station and the town centre, as well as the route between Waitrose and the town centre. This will help to generate greater footfall and expenditure across the High Street, to the benefit of local shops and businesses.

Meeting Needs in Full – Development Opportunities

- 21.44 The local authority has identified the following two sites in Gillingham that could together have the potential to accommodate the forecast need for circa 1,151 – 1,842 sqm net of new convenience goods floorspace over the plan period, up to 2036, along with 1,102 sqm net of new comparison goods floorspace and other leisure uses:
- Site 1: Land off Station Road.
 - Site 2: Land on Kingsmead Business Park / Shaftesbury Road Corridor.
- 21.45 The plans showing the extent of these sites are set out in **Appendix 20** to this report, along with our high level review of their suitability to accommodate new retail and mixed use development over the short (0-5 years), medium (6-10 years) and long term (11 years plus). Please note that our review of the availability and suitability of these sites at the time of preparing this study was informed by evidence provided to us by the local planning authority, site visits and other relevant information.
- 21.46 Based on our high level review of the opportunity sites we concur that the Station Road area provides the best opportunity to meet the forecast need for new retail floorspace in full over the plan period, and to help address the qualitative ‘gap’ in the town centre’s overall non-food offer (subject to market interest and demand). This area is specifically identified by Policy 8 of the submission draft *Gillingham Neighbourhood Plan* (June 2017) for mixed use regeneration to include retail (Class A1), cafés and restaurants (Class A3), hotel, office space, land for information recreation and approximately 200 new homes. Policy 8 also states that the redevelopment of the site will involve the rationalisation and improvement of car parking provision; the provision of stronger pedestrian linkages between the station and High Street; and, as part of this, the extension of shopping frontages to the area/site from the High Street. We also agree that the phasing and delivery of this site for comprehensive redevelopment will need to be guided and informed by a robust masterplan, or development and investment framework. This masterplan/framework will help to address the different land ownerships across the site, identify at an early stage potential barriers and/or risks to development and, most importantly, to test the market appetite for new retail, commercial and employment uses in Gillingham generally, and specifically on the Station Road site.
- 21.47 We note that the submission draft *Gillingham Neighbourhood Plan* (June 2017) refers to a previous report⁵³ which identified the potential for approximately 7,000 sqm of new retail floorspace on the site, along with new cafés/restaurants, a hotel and office space. Clearly the “*physical capacity*” of the site to accommodate new retail and leisure uses is much greater than the forecast “*economic capacity*” for new (comparison and convenience goods) retail of up to circa 2,994 sqm net by 2036. We therefore advise the Council that any masterplan or framework commissioned to assess the development potential of the site should be extended to include the High Street and wider Gillingham Town Centre area. This will ensure that the future plans and development opportunities identified for the Station Road site are fully integrated with, and complementary to maintaining and enhancing the vitality and viability of the High Street as the historic heart of Gillingham’s shopping and leisure offer.
- 21.48 Turning to the land on Kingsmead Business Park / Shaftesbury Road Corridor (site 2), this out-of-centre site extends to circa 0.8ha. Although it is not allocated in the adopted Local Plan for retail uses, Policy 21 of the

⁵³ Gillingham Growth Study (2009), prepared by Atkins.

Local Plan states that as part of the preparation of a Masterplan Framework for the Gillingham Southern Extension it should set out how the remaining undeveloped land at Kingsmead Business Park will be developed to form the preferred location for a local centre at the Shaftesbury Road Corridor. Against this background we note however that an application for a new Aldi of 1,785 sqm gross (1,254 sqm net) on land at Park Farm, Shaftesbury Road, was recently refused planning permission by the local planning authority in August 2017 (reference: 2/2016/1899/FUL). The reasons for refusal included the failure of the application to satisfy the sequential and impacts, and impact on highway safety/capacity. The Council's decision note also specifically states under the third reason for refusal that the proposed development "*by reason of it being a large single store, the use, excessive size, and location would prejudice the delivery of a local centre which is a key part of Gillingham's Strategic Site Allocation contrary to Policies 1, 12, 17, and 21 of the adopted North Dorset Local Plan Part 1 (January 2016)*". Thus, at the time of preparing this study, we conclude that whilst the land at Kingsmead Business Park / Shaftesbury Road Corridor (Site 2) could lend itself to new retail and leisure uses as part of a new local centre to serve the day-to-day needs of the new community, this should not be of a scale to harm the vitality and viability of the town centre, including any existing, committed and planned investment, or to prevent the delivery of potential sequentially preferable sites either in or on the edge of the defined PSA (in compliance with local plan policies and the NPPF).

- 21.49 In summary, we advise that the comprehensive redevelopment of the Station Road site would more than meet the quantitative and qualitative need for new retail floorspace and commercial leisure uses in Gillingham over the plan period. The proposals for a new local centre as part of the Gillingham Southern Expansion Area would also help to meet some of the forecast need.

Definition of Frontages and Primary Shopping Area

- 21.50 The *Gillingham Neighbourhood Plan - Submission Version* (2017) has updated the boundary and frontages set out in the *2005 Annual Monitoring Report* and *North Dorset District-Wide Local Plan* (2003) as described in our health check area.
- 21.51 The defined *Town Centre Area* (TCA) encompasses a relatively large area, including the units between the railway line to the south, Le Neubourg Way to the west and St Marys Place, High street, School Lane and Newbury to the north.
- 21.52 The document does not define a Primary Shopping Area (PSA), but does set out proposed updated frontages:
- Primary Shopping Frontages (PSF) - runs along the southern side of High Street to include the units east of the bridge to the units west of Station Road. Along the northern side of the road, the PSF includes the units east of Gillingham Methodist Church to the units west of the entrance to the Lidl store car park.
 - Secondary Shopping Frontages (SSF) – runs along the northern side of the street and includes the units east of the Lidl car park entrance up to, and including, the Bracher Brothers Funeral Directors. Along the southern side of the street the SSF includes units along the corner of Station Road/Newbury and the western side of Station Road near the junction with High Street. To the west of the town centre units between The Square and South Street are included within the SSF, as well as the units on The Square/St Mary's Place junction. Units along the western end of the High Street are also defined within the SSF.
- 21.53 Although the proposed TCA encompasses a relatively broad area, we consider it to be appropriate given that it includes all major retail and town centre uses alongside the Station Road redevelopment area and railway station.
- 21.54 In summary we recommend that proposed PSFs and SSFs should be retained, although the allocated PSF around the corner of the High Street at the former Co-op store, neighbouring Morton News estate agents and adjacent units should be amended and defined as being a SSF. The SSF proposed within the Draft Neighbourhood Plan along Riverbridge Parade should also be amended to be included within the PSF.

- 21.55 The PSA should broadly replicate the area of the PSFs and SSFs that are defined east of the bridge in compliance with the NPPF.

Shaftesbury

Needs Assessment

- 21.56 Shaftesbury is defined as a 'Town Centre' in the adopted Local Plan. It benefits from an attractive and historic environment, and the majority of the centre is covered by a Conservation Area. Shaftesbury not only supports a good range of shops and services that serve the needs of its residential catchment, but it is also an attractive and popular tourist destination; principally recognised for the famous 'Gold Hill'. Overall we consider that it is performing well and fulfilling its important role and function in the network and hierarchy of centres.
- 21.57 Its main shopping and town centre uses are principally focussed along High Street and Bell Street. It has a low vacancy rate of 3.9%, which is a further positive indication of a healthy town centre.
- 21.58 Shaftesbury has a relatively strong food and convenience goods provision for a centre of its size. Its offer is anchored by a Tesco food store, supported by a number of local independent convenience stores. The retail assessment has forecast capacity for 136 sqm net of new ('superstore format') floorspace by 2021, increasing to 237 sqm net by 2031 and 329 sqm net by 2036. In our judgement this more limited forecast need could be met through the provision of a smaller convenience store, or an extension to an existing store (where possible), or through potential change of use applications.
- 21.59 In terms of its comparison offer, current provision is above the national average and is characterised by a relatively good choice and range of independent and national multiple retailers. As highlighted in Section 19 there is a forecast need for 317 sqm net of new comparison goods floorspace by 2021, increasing to 1,200 sqm net by 2031 and 1,727 sqm net by 2036. This need could potentially be met over the short (up to 2021) to medium term (up to 2026) though possible infill development and/or change of use applications. However, given the scale of need forecast up to 2036, we advise that the Council will need to identify a site or sites in and/or on the edge of these main centres to meet the forecast need in full over the plan period in compliance with the NPPF (paragraph 23). We consider the potential sites identified by the local planning authority at the time of preparing this study in more detail below.
- 21.60 Notwithstanding its good retail offer and its important role as a tourist/visitor destination, Shaftesbury has a relatively weak representation of leisure services. We consider that enhancements to the scale and quality of its leisure offer would be beneficial to Shaftesbury's role as a key visitor destination.
- 21.61 The health check and stakeholder engagement has also identified that accessibility is poor, particularly in terms of public transport, cycle ways and narrow pavements making it difficult for disabled visitors to travel across the centre. Shaftesbury also does not have a rail station.

Meeting Needs in Full – Development Opportunities

- 21.62 The local authority has identified the following two sites in Shaftesbury that could together have the potential to accommodate the forecast need for circa 329 sqm net of new convenience goods floorspace over the plan period, up to 2036, along with 1,727 sqm net of new comparison goods floorspace and other leisure uses:
- Site 1: Cattle Market, Christy's Lane.
 - Site 2: Post Office/Telephone Exchange, Coppice Street.
- 21.63 The plans showing the extent of these sites are set out in **Appendix 20** to this report, along with our high level review of their suitability to accommodate new retail and mixed use development over the short (0-5 years), medium (6-10 years) and long term (11 years plus). Please note that our review of the availability and

suitability of these sites at the time of preparing this study was informed by evidence provided to us by the local planning authority, site visits and other relevant information.

- 21.64 Based on our high level review of the two opportunity sites we consider that the Cattle Market, which extends to just over 1ha, offers the best and most immediate development option available to meet the quantitative and qualitative need for new retail floorspace and leisure uses in the town centre in full over the plan period. The site has been operating as a cattle market since 1958 and is located adjacent to the town's Tesco store and the main town centre car park. It has been identified in the Local Plan as part of a wider mixed use regeneration site, comprising land between Christy's Lane and the town centre. The Council's previous retail study also identified the site as having potential to provide sufficient retail floorspace to meet the town's longer term needs. We understand that the site is also currently being marketed for new development.
- 21.65 Against this background we advise that the Cattle Market site does still lend itself to new retail (convenience and comparison goods) development. Although we have not carried out an appraisal of the site and specifically its physical capacity to accommodate new retail floorspace (including the ability for it to accommodate the necessary access, servicing and parking associated with any new retail development), we nevertheless consider that it could potentially accommodate either one large store or a number of larger format units that would not only meet the forecast need, but would also (critically) be potentially attractive to new operators seeking representation in the town centre. This would need to be subject to more detailed market testing and the preparation of a viable masterplan for the site to demonstrate how it would complement and benefit the town centre's overall vitality and viability (including the potential for linked trips).
- 21.66 Turning to the Post Office/Telephone Exchange building and associated car park/service yard (site 2), there is no evidence that the Post Office is seeking to vacate this building. We have therefore necessarily assumed that it will not be available over the short to medium term. If the building was to become available over the plan period, then we consider that it could be suitable for either: (i) ground floor retail (food/non-food) and/or commercial leisure (café/restaurant) uses, with residential above ground floor; or (ii) for conversion to 100% residential. The car park/service yard could also be appropriate and suitable for new residential (apartment) development, as well as providing an opportunity to create space for a stronger and more legible pedestrian route between the primary shopping area, Tesco and beyond to the Cattle Market site.

Definition of Frontages and Primary Shopping Area

- 21.67 The *2005 Annual Monitoring Report* defines the current Town Centre Area (TCA), whilst the *North Dorset District-Wide Local Plan* (2003) defines the Primary Shopping Frontages (PSFs). The extent of the TCS and PSF are described in detail in our health check assessments. Currently there is no definition of Secondary Shopping Frontages (SSF) or a Primary Shopping Area (PSA).
- 21.68 Based on our health check assessment, site visits and other evidence, we recommend that the TCA should be contracted. To the north, the TCA should exclude: the units north of Bleke Street; the units along the western and eastern sides of Parsons Pool (not including the Bell Street United Church and The Barbers Shop); the units along the western side of Haines Lane; and along Bell Street should only include up to unit no. 16a along the north of the street and up to the library along the south of the street. We also suggest that the units bounding the centre to the east, along the western side of Angel Lane should also be excluded from the TCA however Tesco should be included. To the southeast, along Salisbury Street, only units 1-9 along the western side of the street and units 2-6 along the eastern side of the street should be included within the TCA.
- 21.69 We suggest that the PSF is maintained as set out in the 2003 Local Plan. SSFs should be defined to include those units situated within the TCA along Bell Street and Salisbury Street as well as Swans Yard.
- 21.70 Finally, we advise that a PSA should be defined and, in our judgement, it should broadly replicate the area covered by the PSFs and SSFs, and be extended to include the Post Office and Tesco store.

Sturminster Newton

Needs Assessment

- 21.71 Sturminster Newton is defined as a 'Town Centre' in the Local Plan. However its retail offer is more limited than the other North Dorset town centres.
- 21.72 The main town centre uses are concentrated on Market Cross, Market Place, Station Road and the Exchange Centre.
- 21.73 Although the town is performing relatively well as a shopping and leisure destination in the District's overall network and hierarchy of centres, there are a number of potential weaknesses and gaps in its offer. For example, the number of vacant units in the centre has increased from 7 in 2015 to 9 based on our more recent 2017 audit. This is a higher vacancy rate compared to the majority of the District's other main centres and many of these vacancies comprise large units. Furthermore there have been 3 bank closures in the centre since 2016, meaning that there are currently no high street banks in the town. This is a key service required by local residents and those living within the surrounding catchment; the loss of this service is a concern for the overall health of the town centre.
- 21.74 The town has a relatively good provision of food and convenience stores for a centre its size. Its offer is anchored by Co-op, supported by a number of local independent retailers. There are no large out of centre food stores. The retail assessment has identified a limited economic need for new convenience goods floorspace over the plan period; 44 sqm net by 2021, increasing to 163 sqm net by 2031 and 221 sqm net by 2036. In our judgement this need could be easily met through the provision of a smaller convenience store, or a small extension to existing stores (where possible), or through possible change of use applications.
- 21.75 Overall we consider that Sturminster Newton's comparison goods offer is not as strong as the other main North Dorset centres. It has a limited multiple offer, and is highly dependent on its independent retailers which make an important and significant contribution to the centre's overall offer and diversity. It's more limited current non-food offer compared with the other main town centres is reflected by the fact that there is reduced capacity for 118 sqm net of new floorspace by 2021, increasing to 448 sqm net by 2031 and 645 sqm net by 2036. This need could possibly be met in full through small-scale infill development and/or possibly change of use applications. However, as we advise in Section 19, it may be prudent for the Council to identify a site or sites to meet the future need and/or any potential market demand that may arise from retailers seeking space in the centre.
- 21.76 There is also a regular and popular street market that further supplements the town's retail offer, and is characterised by local traders selling a range of arts, crafts and local food produce.
- 21.77 Sturminster Newton's wider town centre offer also benefits from the Exchange; a multi-functional venue with a theatre. However there is a potential need for further food and beverage provision to complement this offer. As set out above, there is also a concern about the impact on the centre's overall vitality and viability following the closure of all its main high street banks.

Meeting Needs in Full – Development Opportunities

- 21.78 The local authority has identified the following three sites in Sturminster Newton that could have the potential to accommodate the forecast need for circa 221 sqm net of new convenience goods floorspace over the plan period, up to 2036, along with 645 sqm net of new comparison goods floorspace and other leisure uses:
- Site 1: Land south of Station Road.
 - Site 2: Market Hill
 - Site 3: Clarke's Yard area and land at Bath Road/Old Market Hill junction

- 21.79 The plans showing the extent of these sites are set out in **Appendix 20** to this report, along with our high level review of their suitability to accommodate new retail and mixed use development over the short (0-5 years), medium (6-10 years) and long term (11 years plus). Please note that our review of the availability and suitability of these sites at the time of preparing this study was informed by evidence provided to us by the local planning authority, site visits and other relevant information, including the *Sturminster Newton Neighbourhood Plan (2016-2031) Submission Draft*.
- 21.80 Based upon our review of the three site, we consider that Sites 1 and 3 represent the most suitable and viable opportunities to accommodate potential new retail, leisure and town centre uses.
- 21.81 In particular, the land to the south of Station Road provides a strategic site in the heart of the town centre that would clearly help to “*stitch together*” the more traditional shops and services on Market Place/Market Cross, with The Exchange and Trailway Corridor. The *Sturminster Newton Neighbourhood Plan (2016-2031) Submission Draft* (Policy 20) updates and replaces the 2008 Design Brief previously prepared for the site. However, there are a number of potential barriers to redevelopment of the site that will need to be addressed as a priority; including the need to replace existing parking (120 spaces) on-site or elsewhere in the town, and dealing with the complex mix of landowners on the site. As the *Neighbourhood Plan Submission Draft* states, “...the timing of any scheme will depend on the plans, aspirations and cooperation of the various landowners, and the re-development of the area may not all happen at once” (paragraph 5.5.6). The *Neighbourhood Plan Submission Draft* also indicates that up to 1,250 sqm could be accommodated on the site facing on to a new and active Plaza. This scale of floorspace identified would more than meet the forecast need for 866 sqm net of new retail (convenience and comparison goods) over the plan period, along with the potential for new food and beverage (Class A3) uses. Any development of this site would also lend itself to new residential, office and other uses above the commercial uses at ground floor level. Finally, and notwithstanding the updated design brief and Policy 20 of the *Neighbourhood Plan Submission Draft*, we advise that a planning and development brief be prepared for the site to help facilitative its assembly and delivery over the plan period, and, critically, to undertake early testing of market interest and demand for the site for key end users.
- 21.82 In our judgement the site incorporating the Clarkes Yard area and land at Bath Road/Old Market Hill junction (Site 3), at the western end of Railway Gardens, also has the potential to accommodate a range of different uses. It could, for example, accommodate a larger format retail unit, ideally with direct frontage on to Bath Road, and access, servicing and parking to the rear. Another option for the site could be for 100% residential, or for a mixed use scheme with residential above ground floor uses; again with frontage on to Bath Road. A further option, as identified by the *Neighbourhood Plan Submission Draft* (Policy 22), could be for public parking to replace any parking that may potentially be lost from redevelopment of the Station Road site. The site area could also be extended to include the police station and library, although these uses would either need to be retained on-site, or re-provided elsewhere in the town centre. Finally, we advise that careful thought needs to be given to the route of the Trailway, as the route currently shown on Figure 3 of the Submission Draft could effectively blight the redevelopment of the site and undermine its overall viability. For this reason we advise that a planning and development brief be prepared for the site to help inform and guide its redevelopment and the optimum, most viable uses.
- 21.83 Finally, we have reviewed the Market Hill site (Site 2), which is currently a temporary community garden maintained by the Town Council. We conclude that the site layout and configuration does not lend itself to new retail and/or commercial leisure use. In our judgement the optimum development option for the site would be for new residential uses; potentially retirement homes, although this would need to be subject to more detailed financial/market testing.

Definition of Frontages and Primary Shopping Area

- 21.84 The *Sturminster Newton Neighbourhood Plan 2016-2031 Submission Version* updates the boundary and frontages set out in the *2005 Annual Monitoring Report* and *North Dorset District-Wide Local Plan (2003)*, as described in more detail in our health check assessment.
- 21.85 The Town Centre Area (TCA) is defined as comprising the area around the Exchange, including Old Market Hill and Station Road, as well as the area focussed on Market Cross, Market Place and the northern part of Bridge Street. We consider that the proposed TCA is appropriate and should be retained.
- 21.86 However, the Submission Draft Version of the Neighbourhood Plan does not define a Primary Shopping Area (PSA) per se, in compliance with the NPPF. The document only defines general frontages; there is no differentiation, for example, between Primary Shopping Frontages (PSF) and Secondary Shopping Frontages (SSF). These frontages include the area covered by the TCA.
- 21.87 We recommend that separate PSFs and SSFs are defined. In our judgement, the PSF should comprise the units around Market Cross and Market Place. We recommend that the SSF should comprise units within the TCA along Bridge Street and Station Road as well as the Co-op store.
- 21.88 Overall, based on our review, we advise that the PSA is broadly comparable to the defined shopping frontages.

Stalbridge

Needs Assessment

- 21.89 Stalbridge is not defined in the retail hierarchy set out within the North Dorset Local Plan Part 1. The main shopping area is located along High Street and there are only a small number of units (28) within the town centre. The centre therefore has a more limited role and function in the District's network and hierarchy of centres, predominantly meeting the more day-to-day needs of its local resident catchment population.
- 21.90 Notwithstanding this, the overall findings of the health check assessment and stakeholder engagement have identified that Stalbridge, at present, has a number of weaknesses and gaps in its offer that are impacting upon its overall vitality and viability. Of most concern is Stalbridge's vacancy rate of 35.7%, which is significantly higher than the (Experian Goad) national average. We note that a number of the vacant units are poorly maintained and are located along the main High Street, detracting from the centre's overall attraction and appearance.
- 21.91 The town's overall food and convenience provision is below the national average. Notwithstanding this, its offer is anchored by Dike & Son, a local supermarket operator, which draws visitors to the centre for food shopping and performs an important role above what would be expected for a town of Stalbridge's size. The quantitative need assessment has identified limited capacity for 19sqm net of new convenience goods floorspace by 2021, increasing to 37 sqm net by 2031 and 52 sqm net by 2036.
- 21.92 Although there are only eight comparison goods units in the centre we consider that this offer adequately meets of the needs of its local population, given the town's size. The retail capacity assessment has also forecast limited need for new comparison goods floorspace over the plan period; 22 sqm net in 2021, increasing to 81 sqm net by 2031 and 117 sqm net by 2036.
- 21.93 Leisure services are poorly represented in the town centre. There is a below average provision of both leisure and financial services with no banks, restaurants or cafés present in the town centre. There would therefore appear to be the potential to increase the number of services in the centre, particularly its food and beverage offer (subject to market demand testing), to help promote increased trips and longer dwell times.

- 21.94 Overall we consider that Stalbridge is struggling and it is not a healthy and viable centre. Currently some 1 in 4 of its units are vacant. Furthermore, its overall vitality and viability as a shopping destination is highly dependent on Dike and Son, which also helps to generate linked trips and expenditure to other shops and business in the centre. In our judgement, as the centre is not currently defined within the retail hierarchy and given the low vacancy rate and town centre uses present within the centre, Stalbridge should be defined as a 'District Centre' in compliance with the definitions set out in the NPPF.

Meeting Needs in Full – Development Opportunities

- 21.95 The retail assessment has identified limited (economic) capacity for new retail floorspace over the plan period (i.e. 52sqm net of new convenience goods floorspace by 2036, and 117 sqm net for new comparison goods retail). In our judgement this need could easily be met in the town centre through possible infill development, the potential take-up of existing vacant units, and/or change of use applications. We do not therefore consider that there is a requirement at this stage to identify new development sites either in or on the edge of the town centre. Clearly if applications for new retail, leisure or town centre uses are proposed outside the town centre over the plan period, then this will need to be assessed against the sequential and impact tests outlined in the NPPF (paragraphs 24-27) and any other material policies and considerations.

Definition of Frontages and Primary Shopping Area

- 21.96 The adopted development plan does not define shopping frontages, a primary shopping area (PSA) or a town centre boundary (TCB). Based on our health checks, audits and site visits to Stalbridge, we recommend a PSA is defined that broadly follows the High Street, extending from Dike & Son off Ring Street to the south to Duck Lane to the north. Given the size of the centre and its current high vacancy levels, we do not consider that there is a need to define primary and secondary shopping frontages within the PSA. In our view the defined PCA would also be analogous to the TCB.

Retail Hierarchy

- 21.97 We have undertaken a high level review of North Dorset Council's centres to ascertain the centre hierarchy.
- 21.98 The North Dorset Local Plan Part 1 (2016) sets out a hierarchy that defines only town centres. This comprises the town centres of Blandford Forum, Gillingham, Shaftesbury and Sturminster Newton. Our assessment has revealed that all four of the defined centres are fulfilling their role and function as town centres and as such their position within the district's hierarchy of centres should be maintained.
- 21.99 Although assessed as part of this study, Stalbridge is not defined within the existing retail hierarchy. We recommend that Stalbridge is defined as a 'District Centre' in compliance with the definitions set out in the NPPF.
- 21.100 We recommend that the Council, as part of the emerging Local Plan, clearly defines the Local Centres as part of the retail hierarchy. In order to assist the Council with identifying these centres, we have provided commentary on this level of the hierarchy. Currently, there is no definition included within Annex 2 of the NPPF. However, turning to the definition set out in Annex B of Planning Policy Statement 4 (PPS 4), now replaced by the NPPF, Local Centres are considered to have *"a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot food takeaway and a launderette. In rural areas, large villages may perform the role of a local centre"*. Therefore local centres generally provide a top up shopping role serving local needs, often anchored by a small supermarket/convenience store.

21.101 It may be the case that the Council may wish to undertake a separate study to identify such centres and review their health however we consider that the definition above will assist the Council somewhat in identifying these.

Local Impact Threshold

21.102 We have also assessed whether there is a requirement for the local planning authority to set a local (floorspace-based) impact threshold, rather than use the default of 2,500 sqm gross identified by the NPPF (paragraph 26). This is important as it will determine whether applicants should carry out an impact assessment for new retail, leisure and office development outside of town centres that are not in accordance with an up-to-date Local Plan.

21.103 In summary the Planning Practice Guidance (PPG) published in March 2014 provides advice in setting a locally appropriate threshold and states that it will be important to consider the:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

21.104 The research has identified that all the centres to varying degrees are vulnerable to increased competition from out-of-centre retailing and the growth of internet shopping.

21.105 Our assessment of retail trends in **Section 3** has also highlighted the dynamic growth in smaller convenience stores operated by the major grocers (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.). Although sizes vary from location-to-location, the main grocers are generally seeking new convenience stores (e.g. Tesco Express, Sainsbury's Local, Little Waitrose) with a minimum gross floorspace of circa 4,000 sq ft (372 sqm) gross. In circumstances where these smaller stores are proposed on the edge or outside of smaller local and village centres, often as part of petrol filling stations, they could result in a significant adverse impact on their trading performance, and overall vitality and viability. This will particularly be the case where smaller centres and villages are dependent on smaller supermarkets and convenience ('top-up') stores to anchor their retail offer and generate footfall and linked trips/expenditure to the benefit of other shops, services and facilities.

21.106 In addition, modern retailers selling a range of comparison goods (including fashion, homestore and 'bulky' goods retailers) generally have requirements for larger format shop units with a minimum floorspace of approximately 465 sqm (5,000 sq ft) gross. This minimum floorspace provides operators with the necessary 'critical mass' of sales needed to display their full range of goods in-store and attract customers from a wider catchment area, particularly where they are co-located alongside similar stores in town centre and out-of-centre locations. In general terms larger format non-food stores of over 465 sqm gross are also unlikely to trade as a purely local facility.

21.107 We therefore conclude in this case that it is reasonable for applicants proposing developments for new comparison and convenience goods retailing of 300 sqm gross and above to demonstrate that they will not

have a significant adverse impact cumulatively with other commitments in the area, in accordance with the NPPF on any defined centre within the Council area.

- 21.108 In our judgement this is a reasonable impact threshold as it will provide the local planning authority with sufficient flexibility to assess the merits and implications of edge and out-of-centre food store applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres. We also advise that this threshold should be applied, where relevant, to change of use applications and applications seeking variations of conditions.
- 21.109 In our experience a 300 sqm gross impact threshold is reasonable in this case based on our experience of advising other local planning authorities, and also drawing on the minimum impact thresholds identified in recently adopted local plans (including, for example, Richmondshire District Council, Rother District Council, Rotherham Metropolitan Council, Stafford Borough Council, Warrington Borough Council and Norwich City Council).
- 21.110 Notwithstanding the adoption of a lower locally set impact threshold, it is important that the scope of any Retail Impact Assessment (RIA) in support of planning applications is discussed and agreed between the applicants and the Council at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate to the scale and type of retail floorspace proposed, and should be agreed between the Council and applicant on a case-by-case basis. In all cases the local planning authority should adopt a pragmatic and reasonable approach with regard to the scope and detail of evidence required in support of planning applications. Setting a lower impact threshold in this case will provide the local planning authority with the flexibility, as decision-taker, to assess whether an RIA is needed on a case by case basis.

Conclusions

- 21.111 In conclusion, we have identified a number of potential development opportunity sites in the main centres that we consider could accommodate the District-wide and centre-specific forecast need for new retail, leisure and other town centre uses over the plan period. However the exact mix of uses, phasing and scale of floorspace provided would need to be subject to more detailed assessment to cover, inter alia, land assembly, market testing, transport and design issues.

22 WEYMOUTH & PORTLAND - KEY FINDINGS & RECOMMENDATIONS

- 22.1 This section provides a summary of the key findings of the *Joint Retail and Commercial Leisure Study* that are relevant to plan-making and decision-taking in the Weymouth and Portland local authority area. It sets out high level advice on how the Council can effectively plan for, manage and promote the vitality and viability of its main centres over the development plan period; namely Weymouth, Easton and Fortuneswell.
- 22.2 Our advice is informed by the updated quantitative and qualitative need assessment new retail (comparison and convenience goods) floorspace and commercial leisure uses up to 2036. The need assessment draws on a robust and up-to-date evidence base and new primary research, including:
- A health check of the main centres.
 - A telephone interview survey of some 1,200 households across a widely defined Study Area – that includes the North Dorset, West Dorset and Weymouth and Portland Council areas - to help establish current shopping patterns, leisure preferences, market shares and turnover levels.
 - An in-centre ('face-to-face') survey of some 86 visitors to Weymouth Town Centre.
 - Wide-ranging engagement with key stakeholders with a vested interest in the planning, management, development and performance of the main centres, including a stakeholder workshop held on January 9th 2018.
- 22.3 The study has been prepared in the context of national and development plan policy guidance, as well as other key material considerations. This includes the *National Planning Policy Framework* (NPPF) and the *Planning Practice Guidance* (PPG), which place weight on the development of positive plan-led visions and strategies for town centres, and promote new investment and development in town centres first ahead of edge and out of centre locations.
- 22.4 Based on the key evidence and findings of this study, this section provides a brief summary of:
- each centres' relative health, role and function, and any potential (qualitative) weaknesses and/or 'gaps' in their retail and leisure offer;
 - the quantitative need (or 'capacity') for new retail (convenience and comparison goods) floorspace and other main leisure and town centre uses over the plan period;
 - a high level assessment of the availability and suitability of in-centre, edge and out of centre opportunity sites identified by the respective local planning authorities to accommodate the forecast quantitative and qualitative need for new retail floorspace and leisure uses over the plan period (where a need has been identified);
 - the setting of a reasonable and robust impact 'threshold' in accordance with the NPPF (paragraph 26) and PPG that will allow the Council to assess and understand any likely impacts from new edge and out of centre applications on the vitality and viability of each main centre;
 - recommendations for primary and secondary shop frontages, as well as the definition (where appropriate) of a suitable Primary Shopping Area (PSA); and
 - recommendations for maintaining and/or changing the current definition of the retail hierarchy to better reflect existing and future shopping and trading patterns, and the potential for new development.

- 22.5 By way of explanation, the assessment of the potential for the identified development opportunity sites in each centre to meet the forecast scale and type of new retail, leisure and other town centre uses needed over the plan period has been carried out in accordance with the sequential approach set out in the NPPF (paragraph 23) and PPG. In brief, as described in Section 2, the sequential test guides main town centre uses towards town centre locations first, then, if no town centre locations are available, to edge of centre locations⁵⁴, and, if neither town centre locations nor edge of centre locations are available, to out of town centre locations; with preference for accessible sites which are well connected to the town centre. This test is important as it supports the viability and vitality of town centres by placing existing town centres foremost in both plan-making and decision-taking. In plan-making, the sequential approach requires a thorough assessment of the suitability, viability and availability of locations for main town centre uses. It also requires clearly explained reasoning if more central opportunities to locate main town centre uses are rejected. The NPPF (paragraph 23) is clear that it is important that needs “...are met in full and are not compromised by limited site availability”, and it advises that local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites.
- 22.6 It is against this background that we set out below our main findings and recommendations to help inform plan-making in Weymouth and Portland, specifically focusing on positive policies that will help with the management and growth of competitive town centres over the plan period in compliance with the NPPF.

Retail and Leisure Needs Assessment

- 22.7 **Section 19** assessed the overall quantitative need ('capacity') for new retail (convenience and comparison goods) floorspace in the Weymouth and Portland area and its main centres/stores over the development plan period, up to 2036.
- 22.8 The retail capacity assessment is informed by CJ's **CREAT^e** Capacity Model. This model has been designed and developed by CJ over a number of years to help identify the need for new retail floorspace and to test the impact of new floorspace on the trading/turnover performance of existing centres and stores.
- 22.9 The retail capacity assessment is underpinned by robust evidence (principally the household survey) and forecasts (sourced from Experian Business Strategies and the Councils). In line with standard approaches, the capacity forecasts assume that the retail market is in '*equilibrium*' at the base year (2017) and that market shares remain constant over the study period.
- 22.10 It is important to restate at this point that capacity forecasts beyond five years should be interpreted with caution. This is because they are based on various layers of assumptions and forecasts with regard to changes in the national and local economy; the trading performance of existing centres and stores; the growth in population and retail spending; etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could further 'dampen' the future demand and capacity for new (physical) floorspace over the long term. The Councils should therefore take into account these margins for error when assessing the need for new retail floorspace over the medium term (5-10 years) and long term (10 years plus), and should regularly review and 'refresh' the forecasts to take account of changes in the baseline assumptions and forecasts.
- 22.11 The tables below summarise the forecast need for new convenience and comparison goods (net) floorspace over the plan period, up to 2036.

⁵⁴ By way of clarification the NPPF explains in the Glossary (Annex 2) that for retail purposes, edge-of-centre is defined as a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.

Table 21.1: Weymouth & Portland BC: Convenience Goods Capacity (Net) by Locations – New Superstore Format (sqm)

	2021	2026	2031	2033	2036
Weymouth	62	128	145	159	182
Portland, Easton	127	173	180	195	218
Portland, Fortuneswell	-189	-185	-185	-183	-181
All smaller villages/local centres	19	43	50	55	62
All Out-of-Centre	441	1,213	1,416	1,590	1,861
TOTAL WEYMOUTH & PORTLAND LPA - CONVENIENCE GOODS CAPACITY	460	1,371	1,606	1,816	2,142

Table 21.2: Weymouth & Portland BC: Comparison Goods Capacity (Net) by Locations (sqm)

	2021	2026	2031	2033	2036
Weymouth	1,185	3,467	5,024	5,922	7,319
Portland, Easton	43	114	163	191	234
Portland, Fortuneswell	2	6	9	10	12
All smaller villages/local centres	40	106	151	177	218
All Out-of-Centre	293	778	1,108	1,299	1,595
TOTAL WEYMOUTH & PORTLAND BOROUGH-WIDE COMPARISON GOODS CAPACITY	1,563	4,472	6,455	7,599	9,379

- 22.12 For **convenience goods** ('superstore format') floorspace only, the table shows that there is limited Borough-wide capacity of 460 sqm net for new convenience goods floorspace in the between 2017 and 2021 after taking account of all known commitments. This scale of capacity could accommodate one or two smaller convenience stores up to 2021.
- 22.13 For **comparison goods** there is Borough-wide capacity for 1,563 sqm net of new comparison goods floorspace between 2017 and 2021 after allowing for all known commitments. The forecast capacity increases thereafter to 4,472 sqm net by 2026, 6,455 sqm net by 2031, 7,599 sqm net by 2033 and 9,379 sqm net by 2036.
- 22.14 We assess the ('disaggregated') capacity for new retail floorspace in the District's main centres and smaller local centres/villages in more detail below.
- 22.15 With regard to out-of-centre retailing, the retail assessment shows that there is forecast (economic) capacity for 1,861 sqm net of new convenience good floorspace by 2036, and 1,595 sqm net of comparison goods floorspace. This additional floorspace need generated by existing out-of-centre stores should be directed to the main centres and edge-of-centre sites as a priority in accordance with the sequential approach. However, if sites cannot be identified, the Council will need to put in place robust development management policies in accordance with the NPPF (paragraphs 24-27) that will enable the assessment and determination of any future applications that are not in a centre and not in accordance with an up-to-date development plan.
- 22.16 **Section 20** of this study broadly assesses the quantitative and qualitative need for new commercial leisure uses across the study area and three local authority areas, and identifies any significant 'gaps' in provision. It is important to restate at the outset that forecasting the need for new commercial leisure uses is more complicated and problematic than for retailing. This is because the leisure sector is highly dynamic, and particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently the methods and approaches developed to forecast the need for new commercial leisure floorspace and uses are more wide-ranging and generally less sophisticated than for retail capacity forecasts. Furthermore, as for retail, the broad forecasts of the quantitative and qualitative need for new leisure uses and floorspace are highly dependent on market demand for representation in centres and areas. For example, just because there is a forecast (economic) need or 'gap' in provision at the local level does not necessarily mean that commercial leisure operators will automatically have requirements, or be seeking space. Stimulating market demand will depend on a number of factors; ranging from marketing the opportunities, to providing the right

sites/buildings, in the right locations at the right time that meet the needs of modern commercial leisure operators. These opportunities will most likely be in the form of mixed use highly sustainable developments, generally characterised by a range of retail, office, commercial leisure and residential uses.

22.17 Against this background, the leisure assessment for Weymouth & Portland has broadly identified the following needs:

- Although there is no demonstrable quantitative need for new cinema screens over the plan period, this does not negate the potential for an alternative complementary venue to Cineworld in Weymouth over the plan period, or in the other main West Dorset centres. However this will necessarily be subject to more detailed 'testing' of market demand from potential cinema operators for representation in West Dorset and its main centres.
- A potential need for between 3,084 sqm gross and 7,652 sqm gross of new food and beverage outlets (including cafés, restaurants, pubs and wine bars) up to 2036.
- A potential need for possibly one budget gym or health/fitness centre over the plan period; subject to market demand.
- The potential to improve the overall quality and offer of other commercial leisure uses, tourist/visitor accommodation (including hotels) and cultural attractions/facilities across the study area and its main centres, subject to market demand investment potential.

Weymouth

Needs Assessment

22.18 Weymouth is defined as a '*Main Town Centre*' in the Local Plan, and is the largest centre within Weymouth and Portland Borough.

22.19 It has a wide range of retail, leisure and community uses and facilities serving both the local population and the many visitors and tourists to the centre and area. Overall we consider that Weymouth is fulfilling its role and function as the main town centre in the District's network and hierarchy of centres.

22.20 The town centre's retail and leisure offer mainly follows a grid-like pattern; with the main shopping areas comprising New Bond Street, St Mary Street and St Thomas Street. The Esplanade and Trinity Road provide a different retail and leisure experience due to their sea front location.

22.21 Overall the health check assessment has identified that there is a relatively limited food and convenience goods provision in and on the edge of the town's primary shopping area (PSA); its offer is mainly anchored by a Marks and Spencer Food Hall and Tesco Metro. The majority of food stores offering a full range of products are located outside the town centre. There is therefore a pressing qualitative need for new food and convenience stores to be located in the town centre first, to help rebalance the significant out-of-centre provision and market shares. New provision in the town centre will also help to meet the needs of the planned and proposed residential developments outside the town that will look to Weymouth to meet their 'bulk' food shopping and service needs.

22.22 The limited scale and current provision of food and convenience stores in Weymouth's PSA is reflected by the limited (economic) capacity for new convenience good floorspace of 62 sqm net by 2021, increasing to 145 sqm net by 2031 and 182 sqm net by 2036. This capacity could potentially be met through new smaller convenience store provision, or by the extension to existing stores.

22.23 In contrast, the main forecast capacity for 1,416 sqm net of new ('superstore format') convenience goods floorspace by 2031 and 1,861 sqm net by 2036 is being generated by Weymouth and Portland's out-of-centre retail stock. The equivalent need for new 'supermarket/discounter format' floorspace is higher; at 2,266 sqm net by 2031, increasing to 2,978 sqm net by 2036. In our judgement this level of forecast need could support

either one medium-sized foodstore operated by one of the 'top 6' grocers, or possibly two supermarkets or discounters. As stated above, we advise that this future need should be directed to sites either in or on the edge of Weymouth and/or the District's other main town centres first in compliance with the NPPF sequential approach. We consider the potential availability and suitability of sites in Weymouth to accommodate the forecast (quantitative) need for new in-centre and out-of-centre convenience floorspace in more detail below.

- 22.24 Overall Weymouth benefits from a strong comparison goods offer, which appeals to both residents and day/overnight visitors. Debenhams and Marks and Spencer are the two key anchor stores that help to underpin the centre's vitality and viability. There are also a wide range of non-food categories represented across the centre. Weymouth's retail offer also benefits from a weekly market held in the Swannery Car Park.
- 22.25 The majority of the District-wide capacity for new comparison goods floorspace is focussed on Weymouth. There is a potential need for 1,185 sqm net in 2021, increasing to 3,467 sqm net by 2026, 5,922 sqm net by 2033 and 7,319 sqm net by 2036. This need could potentially be met over the short (up to 2021) to medium term (up to 2026) though possible infill development and/or change of use applications. However, given the scale of need forecast up to 2036, we advise that the Council will need to identify a site, or more likely sites in and/or on the edge of Weymouth to meet the forecast need in full over the plan period in compliance with the NPPF (paragraph 23). We consider the potential sites that could accommodate this need in more detail below.
- 22.26 The health check assessment has identified that there is a relatively good representation of services across the town centre. For example, the majority of high streets banks are located in the town. There is also a particularly strong leisure service provision including cafés, restaurants, bars/nightclubs, public houses, takeaways, and a cinema. There are also leisure uses unique to Weymouth that reflect its important role and function as a coastal resort, and also make a significant contribution to its overall vitality and viability; such as amusement arcades, a theatre, Sea Life Centre and Jurassic Skyline tower (although not all of these are located within the town centre boundary).
- 22.27 Weymouth's overall attraction, character and appeal to local residents and visitors alike is defined by its seafront and waterfront harbour side setting. Notwithstanding the attraction of its beach and harbour, the health check and stakeholder engagement has identified that other areas (including the PSA), despite being mainly pedestrianised, are in need of revitalisation and modernisation, particularly in terms of the appearance of a number of shop fronts and buildings.
- 22.28 The Peninsula is another area in need of improvement and regeneration. This site is allocated within the Local Plan for redevelopment and the Weymouth Masterplan allocates the Peninsula as well as four other key town centre sites, including the Harbourside and the Station Gateway, for redevelopment.

Meeting Needs in Full – Development Opportunities

- 22.29 The local authority has identified the following 14 sites in Weymouth that could potentially accommodate the forecast need for circa 3,160 sqm net of new convenience goods floorspace over the plan period, up to 2036 (please note that this includes the forecast need generated by all the District's out-of-centre foodstores); along with 7,319 sqm net of new comparison goods floorspace and other leisure uses:
- Site 1: Jubilee Sidings
 - Site 2: Swannery Car Park
 - Site 3: Bus Depot
 - Site 4: Melcombe Regis Car Park
 - Site 5: Park Street Car Park
 - Site 6: Weymouth Bowling Club, Commercial Road

- Site 7: Harbourside Car Park
- Site 8: Colwell Shopping Centre
- Site 9: Multi-storey Car Park and Post Office Sorting Office, Commercial Road
- Site 10: The Loop Car Park, Commercial Road
- Site 11: Westwey Road South (the Gas Holder site) / Court Offices
- Site 12 : Council Offices
- Site 13: John Street, Lakeside Bowling
- Site 14: Land at Governor's Lane (Car Park)
- Site 15: Peninsula

22.30 The plans showing the location and extent of these sites are set out in Appendix 19 to this report, along with our high level review of their suitability to accommodate new retail and mixed use development over the short (0-5 years), medium (6-10 years) and long term (11 years plus). Please note that our review of the availability and suitability of these sites at the time of preparing this study was informed by evidence provided to us by the local planning authority, site visits and other relevant information, including the *West Dorset, Weymouth and Portland Local Plan 2015* and *Weymouth Town Centre Masterplan 2015*.

- **Site 1: Jubilee Sidings** – The site is 2.01 ha in size. Jubilee Sidings are owned by Network Rail who leases part of the site to an asset management company who in turn lease the buildings to the current occupiers. The whole of the site is occupied by a car park, and a number of retail warehouse units (including B&Q, Sports Direct, Halfords and Kwik-Fit). To the west the site is surrounded by the Jubilee Retail Park (which includes Aldi, Matalan, Pets at Home, and Currys PC World); and to the south east lies Weymouth Railway Station. We are advised by the Council that there is no relevant planning history associated with the site. The site partially lies within the Town Centre Area; and falls within the area covered by the Local Plan 2015 allocation WEY 3 “*Station Area and Swannery Car Park*”, which seeks the redevelopment of the Weymouth station area as a transport hub, including a mix of retail, commercial businesses and residential uses. The Weymouth Town Centre masterplan, October 2015, seeks the development of a residential use on the north part the site (i.e. where the existing car park and the B&Q unit are), and mixed use with office/business focus on the rest of the Jubilee Sidings site. In our judgement Site 1, given its current occupiers and surrounding retail uses, could accommodate new bulky goods / larger format retailers’ warehouses. The key question however, is whether the site can be made available for redevelopment in reasonable time: in our view the existing retail occupiers are unlikely to vacate the premises unless prompted, meaning that it is only the remainder of the site (i.e. some 1.2 ha) that is more realistic to secure development. However, the remainder of the site in question is currently used as a public car park, and hence any development would need to take account of parking provision/re-provision, and the parking needs of any proposed scheme. Further investigation and viability testing will be needed to confirm what is achievable on the site.
- **Site 2: Swannery Car Park** - The site is approximately 2.2 ha in size and is owned by WPBC. It is occupied by Swannery Car Park, public toilets and RSPB reserve visitor centre. The car park is also used to host the Weymouth market in Spring and Summer months. We are advised by the Council that there is no relevant planning history associated with the site. The site falls within the area covered by the Local Plan 2015 allocation, WEY 3 “*Station Area and Swannery Car Park*”, which seeks the redevelopment of Weymouth Railway station area as a transport hub, including a mix of retail, commercial businesses and residential uses; where the Swannery Car Park is to provide the main public car parking area for the town centre, with the potential for complementary development to help improve first impressions of the area without undermining the vitality of the town centre. The Weymouth Town Centre Masterplan (June 2015) seeks for the parking to be maintained on the site. Given the surrounding uses we consider that Site 2 could possibly accommodate new bulky goods/larger format retail warehousing. The key question is whether the site can be made available for redevelopment in reasonable time given the likely need to take account of parking provision/reprovision, and the parking needs of any proposed scheme. Should the site be redeveloped it would also be necessary to consider the relocation of the market. Further investigation and viability testing will therefore be needed to assess and test what is achievable on the site.

- **Site 3: Bus Depot** - The site is 0.45 ha in size and is owned by First Hampshire & Dorset Ltd. It is occupied by the bus depot operated by First Bus. We are advised by the Council that there is no relevant planning history associated with the site. The site lies within the Town Centre Area; and also falls within the area covered by the Local Plan 2015 allocation, *WEY 3 "Station Area and Swannery Car Park"*, which seeks the redevelopment of Weymouth Railway Station area as a transport hub, including a mix of retail, commercial businesses and residential uses. The *Weymouth Town Centre Masterplan* seeks residential use on the site. It is considered that this site, if redeveloped, has potential to deliver some small scale retail floorspace, the use of which is likely to be associated with the transport hub.

- 22.31 Given the geographical proximity of the above three sites (Site 1, 2 and 3) and the similarities in the current policy allocations (i.e. the identified need to deliver a mixed use hub / gateway around the railway station), it is considered that the redevelopment of these sites should be considered together. Based on a high level review (and assuming that the existing larger retail units remain onsite, whilst the majority of the parking area is redeveloped) we consider that the sites could accommodate a significant proportion of the forecast need for new retail floorspace, along with the potential for some leisure uses. We recommend that a detailed planning development brief is drawn up to cover the three sites. This would help to test the possible retail development options, and in the context of the Council's aspirations, to deliver other uses in the affected area. Given that the sites are located out of centre, it would also be necessary to assess any scheme against the key NPPF retail planning tests (i.e. impact and sequential).
- 22.32 Based on their locations along the marina and similarities in current policy allocation we have assessed the availability and suitability of the following six sites together. **Site 4: Melcombe Regis Car Park** is 0.35 ha, and is currently occupied by a car park which is owned and operated by WPBC. To the north lies the Palm House Garden centre with its car park, and to the south lies **Site 6: Weymouth Bowling Club**, Commercial Road which is 0.2 ha in size, and is occupied by the Weymouth Bowling Club. To the east lies **Site 5: Park Street Car Park**, which is 0.4 ha in size and which is currently occupied by a car park owned and occupied by WPBC. Moving southward, **Site 7: Harbourside Car Park** is 0.31 ha in size, and **Site 10: The Loop Car Park**, Commercial Road is approximately 0.4 ha in size, both occupied by a car park.
- 22.33 We are advised by the Council that there is no relevant planning history associated with these sites. All six sites are located within the Town Centre Area, and fall within the area covered by the Local Plan 2015 allocation under *Policy WEY2 "Town Centre Core and Commercial Road Area"*, which seeks the redevelopment for a mix of uses complementary to the primary shopping area. This is to include waterside frontages with appropriate town centre uses such as cafés and restaurants on the ground floor with residential above; but not to significantly increase the number of late night entertainment uses. The *Weymouth Town Centre Masterplan* seeks for the parking to be maintained on Site 4 and on Site 5, and for parking to be provided on Site 6.
- 22.34 Given the current use of the above sites, and the Council's aspiration to maintain/introduce parking on sites 4, 5 and 6, we consider that none of the sites are well suited or are likely to become available for major retail development in the reasonable future. Whilst, subject to an appropriate scheme, the sites could deliver a ground floor waterfront leisure-led scheme which, in commercial terms, could include some complementary retail floor space, this would (and should) be of small scale. Given that the sites currently do not benefit from a strong relationship with the PSA, it is considered that a predominantly retail development would not be desirable.
- 22.35 **Site 8: Colwell Shopping Centre** extends to 0.1 ha, and the centre is owned by 10 Ant Ltd. Planning permission to demolish existing buildings and erect 2 shop units (94 sqm) and 23 apartments with parking, bin and cycle stores has been recently granted (WP/15/00137/OUT). The site lies within the Town Centre Area and the PSA, benefits from having a Secondary Shopping Frontage and falls within the area covered by the Local Plan 2015 allocation under *Policy WEY2 "Town Centre Core and Commercial Road Area"*, which seeks the Primary Shopping Area (PSA) to continue being the main retail core. Given the small scale of the site and the extant planning permission, we consider that it only has the potential for small scale 'in-fill' retail or

commercial leisure development. Any retail would need to be provided at ground floor, with other uses on upper levels.

- 22.36 **Site 9: Multi-storey Car Park and Post Office Sorting Office**, Commercial Road is 0.4 ha in size and comprises a multi-storey Britannia car park and the Post Office Sorting Office. WPBC are freeholders of the multi-storey car park. The Post Office site is owned by BT. The site is constrained in part by the significant amount of cabling running through the building as a direct consequence of its telephone exchange function. We are advised by the Council that there is no relevant planning history associated with the site. The site lies within the Town Centre Area and the PSA, and falls within the area covered by the Local Plan 2015 allocation under *Policy WEY2 "Town Centre Core and Commercial Road Area"*, which seeks the PSA to continue being the main retail core. In our judgement, the redevelopment of this site is constrained by existing active uses, making land assembly a challenge, as well as the constraints associated with the telephone exchange utilities. Should the site be redeveloped, the Council will also need to consider the loss of existing car parking and the possible need for re-provision. However, subject to overcoming these issues, this site could provide a good opportunity for retail-led development on ground/first floors, with other uses on upper floors. It is noted that, in terms of urban design, the site is not well linked with PSF and SSF, and hence this relationship would need to be improved if the site is redeveloped.
- 22.37 **Site 11: Westway Road South (the Gas Holder site) / Court Offices** extends to 2.88 ha in size and is in multiple ownership. Part of the site has recently been purchased by National Grid. The rear of the site is currently occupied by Tyre City. We have been advised by the Council that the site does not have any relevant planning history. The site is occupied by various uses, including offices, a magistrate's court and a gasholder. The site is surrounded by the Asda Superstore to the south, residential dwellings to the west and the marina to the east. There is an electrical sub-station to the south east of the site which is a constraint on the future redevelopment of the site. The site falls out of centre, and within the area covered by the Local Plan 2015 allocation under *Policy WEY7 "Westway Road and North Quay Area"*, which seeks redevelopment for a mix of uses which may include residential, a hotel, commercial and small scale retail development. The *Weymouth Town Centre Masterplan* seeks harbour facilities on the site.
- 22.38 We do not disagree with the current site allocation, although we do consider that there could be potential for larger format retail subject to market demand, and provided that any new retail floorspace in this location does not have a significant adverse impact on Weymouth town centre's vitality and viability. However it is noted that the land assembly of the site may be difficult and hence its delivery may be pushed back towards the end of the Plan Period. Notwithstanding this, if the land contamination can be mitigated, the sub-station issue resolved and land assembly achieved the overall package of sites do present an attractive redevelopment opportunity. The Magistrate's Court would also need to be relocated in order to facilitate the more comprehensive regeneration of the site.
- 22.39 **Site 12: Council Offices** extends to 1.15 ha in size, and currently hosts the former WPBC Offices. There is an extant planning permission WP/15/00031/OUT to demolish the office buildings and erect 72 dwellings and approximately 216 sqm of commercial space. A second change of use application (WP/16/00745/OFF) from office to dwelling has been allowed at appeal in January 2018. This proposal would see the conversion of the former Council Offices into 56 self contained flats. Whilst the sale of the site is not currently progressing, we understand that the Council remains committed to developing the site (although they are also currently reviewing options). The site lies within the Town Centre Area, is adjacent to the current SSF, and falls within the area covered by the Local Plan 2015 allocation under *Policy WEY7 "Westway Road and North Quay Area"* which seeks the redevelopment of mixed uses which may include residential, a hotel, commercial and small scale retail development. Although the site is physically capable of accommodating new retail floorspace, it is separated from the PSA and is predominantly surrounded by non-retail uses. It is therefore considered that whilst some small scale ancillary retail and commercial leisure uses could be suitably accommodated on the site, the site predominantly lends itself to commercial (such as offices) and residential uses in our view.

- 22.40 **Site 13: John Street, Lakeside Bowling** extends to 0.38 ha and is occupied by a bowling complex and its car park. It is owned by Newbury Leisure Ltd as the leaseholder, and WPBC is the freeholder. The site lies within the Town Centre Area. We have been advised by the Council that the site does not have any relevant planning history.
- 22.41 In our judgement any potential redevelopment of this site is constrained by the existing active use, making land assembly a challenge. However, subject to overcoming these issues, this site could provide a good location for retail and commercial leisure uses at ground floor level, with other uses on upper floors (e.g. residential). However the site is not well linked with core retail area and passing footfall is low. As a result the commercial viability of redeveloping this site for a mix of uses, including new retail and commercial leisure, would depend on strengthening the pedestrian retail circuit and creating a 'destination venue'.
- 22.42 **Site 14: Land at Governor's Lane (Car Park)** extends to 0.1 ha and is occupied by a car park. The site is owned by WPBC. It is surrounded by residential properties, and does not benefit from good connectivity with the PSF and SSF. The site does not have any relevant planning history. It also lies within the Town Centre Area, and falls within the area covered by the Local Plan 2015 allocation under *Policy WEY5 "The Esplanade South"*. This specifically restricts development that would increase late night entertainment; it controls un-neighbourly entertainment and related uses (including A4 and A5), but encourages evening economy uses (i.e. between 5 and 9 pm). Given the current use, it is considered that the site is not currently available for redevelopment. Should the availability status change, given its context, the site lends itself for a residential-led scheme, with potential for some small-sale retail floorspace at ground floor, subject to market demand and viability.
- 22.43 **Site 15: Peninsula** extends to 4.38 ha in size and is owned by WPBC. The site currently hosts a Ferry Terminal, the Weymouth Pavilion theatre and a car park. The site lies within the Town Centre Area, and falls within the area covered by *Policy WEY6 "Ferry Peninsula"* of the Local Plan 2015. This seeks the redevelopment of the site for leisure / tourist-related uses, supported by complementary town centre uses, which may include housing, as well as provision for the continued operation of the ferry. The *Weymouth Town Centre Masterplan* seeks the development of the site for mixed use. We understand that the Council as landowner is currently working up a leisure-led mixed-use scheme for the site, which is likely to be the subject of a planning application towards the end of 2018. Based on the above, it is considered that the site is best suited for a leisure-led / tourist-related mixed use development. Complementary specialist retail uses could also be accommodated on this site, subject to market testing and detailed design.
- 22.44 Based on the above, we conclude that Sites 1-3 are the most suitable locations to accommodate the identified capacity for retail floorspace over the plan period in a comprehensive manner. We recommend that a detailed planning development brief is drawn up to cover the three sites. This would help to test the possible retail development options, and in the context of the Council's aspirations, to potentially deliver other uses. Given that the sites are located out of centre, it would also be necessary to assess any scheme against the retail test as set out by the NPPF (i.e. impact and sequential).

Definition of Frontages and Primary Shopping Area

- 22.45 The *West Dorset, Weymouth & Portland Local Plan Policy Map* (2015) sets out the defined Town Centre Area ('TCA'), Primary Shopping Frontages ('PSF'), Secondary Shopping Frontages ('SSF') and Primary Shopping Area ('PSA'). Based on our health check assessment and site visits we consider that the existing TCA, PSA, PSF, SSF definitions are robust and appropriate, and should largely be retained. We advise that the TCA is drawn-in at the western end of North Quay to exclude the former Council Offices and at Cove Row to omit existing residential development.

Easton (Portland)

Needs Assessment

- 22.46 Easton is defined as a '*Larger Local Centre*' in the Local Plan.
- 22.47 The health check has identified that it has a relatively small number of shops and services, mainly concentrated along Easton Street, Easton Square, Straits and Reforne. These shops predominantly serve its local resident catchment population. In our judgement the centre's overall vitality and viability can be described as being adequate, with the potential for improvement.
- 22.48 The town centre's food store offer is anchored by a Co-op and large Tesco store. However the latter is poorly connected to the main town centre and these linkages could be strengthened through a range of actions, including; new signage and planting. The quantitative retail assessment has identified limited capacity for 127 sqm net of new convenience goods floorspace, increasing to 180 sqm net by 2031 and 218 sqm net by 2036.
- 22.49 Easton's non-food offer is relatively basic and there is potential in our view to improve the overall quality, offer and mix of goods sold in the centre, subject to market demand. The Easton Centre should be the focus for the centre's shopping offer, but is a small shopping centre that is under-occupied and would benefit from regeneration. Easton's existing independent offer is good and should be built on, increasing the niche retail offer. In terms of the quantitative need for new comparison goods retail over the plan period, the retail assessment has forecast capacity for 43 sqm net by 2021, increasing to 163 sqm net by 2031 and 234 sqm net by 2036.
- 22.50 The centre would also benefit from the introduction of a street market.
- 22.51 The centre also has a relatively weak leisure service provision. There could be scope to introduce more restaurants and cafés, subject to market demand, as well as overnight accommodation to help capture expenditure from visitors who travel to the island for day trips during the summer months.
- 22.52 Overall, Portland has a relatively pleasant environment although we conclude that there are opportunities to build on the existing character of the centre by improving links to Easton Square as well as improving the general public realm.

Meeting Needs in Full – Development Opportunities

- 22.53 The retail assessment has identified limited (economic) capacity for new retail floorspace over the plan period (i.e. 218 sqm net of new convenience goods floorspace by 2036, and 234 sqm net for new comparison goods retail). In our judgement this need could easily be met in the town centre though possible infill development (including the potential improvement and redevelopment of the shopping centre), the potential take-up of existing vacant units, the extension to existing stores, and/or change of use applications. We do not therefore consider that there is a requirement at this stage to identify new development sites either in or on the edge of the town centre. Clearly if applications for new retail, leisure or town centre uses are proposed outside the town centre over the plan period, then this will need to be assessed against the sequential and impact tests outlined in the NPPF (paragraphs 24-27) and in the local plan, along with any other material policies and considerations

Definition of Frontages and Primary Shopping Area

- 22.54 The *West Dorset, Weymouth & Portland Local Plan* (2015) does not define a Town Centre Area ('TCA') or Primary Shopping Area ('PSA'), including Primary Shopping Frontages ('PSF') and Secondary Shopping Frontages ('SSF').

- 22.55 We therefore recommend that a TCA be defined to comprise the length of Easton Street, from nos. 52/45 at the north of the street to the south; nos. 10-4 Reforne; all units around Easton Square, including the church and the units within the Easton Centre; the units along Parks Road, up to and including the Tesco store; and the units along Straits up to the library along the northern side of the street and no. 35 on the southern side of the street.
- 22.56 We also recommend that a PSA is defined to encompass the suggested PSFs and SSFs, as follows:
- Primary Shopping Frontages - defined to include nos. 36 Easton Square (Co-op) - the library; and the units between Martin's (no. 3/5 Straits) to Boots (no. 2 Easton Square); and
 - Secondary Shopping Frontages – to include the length of Easton Street; units within the TCA along Reforne and northern side of Easton Square; as well as nos. 35-7 Straits.

Retail Hierarchy

- 22.57 We have undertaken a high level review of Weymouth and Portland Council's centres to ascertain the centre hierarchy.
- 22.58 The West Dorset, Weymouth & Portland Local Plan (2015) defines Weymouth as a town centre and Easton (Portland) as a Local Centre. Our assessment has revealed that both centres are fulfilling their role and function and as such their position within the borough's hierarchy of centres should be maintained.
- 22.59 We recommend that the Council, as part of the emerging Local Plan, clearly defines the Local Centres as part of the retail hierarchy. In order to assist the Council with identifying these centres, we have provided commentary on this level of the hierarchy. Currently, there is no definition included within Annex 2 of the NPPF. However, turning to the definition set out in Annex B of Planning Policy Statement 4 (PPS 4), now replaced by the NPPF, Local Centres are considered to have *"a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot food takeaway and a launderette. In rural areas, large villages may perform the role of a local centre"*. Therefore local centres generally provide a top up shopping role serving local needs, often anchored by a small supermarket/convenience store.
- 22.60 It may be the case that the Council may wish to undertake a separate study to identify such centres and review their health however we consider that the definition above will assist the Council somewhat in identifying these.

Local Impact Threshold

- 22.61 We have also assessed whether there is a requirement for the local planning authority to set a local (floorspace-based) impact threshold, rather than use the default of 2,500 sqm gross identified by the NPPF (paragraph 26). This is important as it will determine whether applicants should carry out an impact assessment for new retail, leisure and office development outside of town centres that are not in accordance with an up-to-date Local Plan.
- 22.62 In summary the Planning Practice Guidance (PPG) published in March 2014 provides advice in setting a locally appropriate threshold and states that it will be important to consider the:
- scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;

- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

- 22.63 While the quantitative and qualitative research evidence indicates that the main towns and smaller centres in appear to be vital and viable, they are nevertheless vulnerable to increased competition from out-of-centre retailing and the growth of internet shopping.
- 22.64 Our assessment of retail trends in **Section 3** has highlighted the dynamic growth in smaller convenience stores operated by the major grocers (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.). Although sizes vary from location-to-location, the main grocers are generally seeking new convenience stores (e.g. Tesco Express, Sainsbury's Local, Little Waitrose) with a minimum gross floorspace of circa 4,000 sq ft (372 sqm) gross. In circumstances where these smaller stores are proposed on the edge or outside of smaller local and village centres, often as part of petrol filling stations, they could result in a significant adverse impact on their trading performance, and overall vitality and viability. This will particularly be the case where smaller centres and villages are dependent on smaller supermarkets and convenience ('top-up') stores to anchor their retail offer and generate footfall and linked trips/expenditure to the benefit of other shops, services and facilities.
- 22.65 In addition, modern retailers selling a range of comparison goods (including fashion, homestore and 'bulky' goods retailers) generally have requirements for larger format shop units with a minimum floorspace of approximately 465 sqm (5,000 sq ft) gross. This minimum floorspace provides operators with the necessary 'critical mass' of sales needed to display their full range of goods in-store and attract customers from a wider catchment area, particularly where they are co-located alongside similar stores in town centre and out-of-centre locations. In general terms larger format non-food stores of over 465 sqm gross are also unlikely to trade as a purely local facility.
- 22.66 We therefore conclude in this case that it is reasonable for applicants proposing developments for new comparison and convenience goods retailing of 300 sqm gross and above to demonstrate that they will not have a significant adverse impact cumulatively with other commitments in the area, in accordance with the NPPF on any defined centre within the Council area.
- 22.67 In our judgement this is a reasonable impact threshold as it will provide the local planning authority with sufficient flexibility to assess the merits and implications of edge and out-of-centre foodstore applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres. We also advise that this threshold should be applied, where relevant, to change of use applications and applications seeking variations of conditions.
- 22.68 In our experience a 300 sqm gross impact threshold is reasonable in this case based on our experience of advising other local planning authorities, and also drawing on the minimum impact thresholds identified in recently adopted local plans (including, for example, Richmondshire District Council, Rother District Council, Rotherham Metropolitan Council, Stafford Borough Council, Warrington Borough Council and Norwich City Council).
- 22.69 Notwithstanding the adoption of a lower locally set impact threshold, it is important that the scope of any Retail Impact Assessment (RIA) in support of planning applications is discussed and agreed between the applicants

and the Council at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate to the scale and type of retail floorspace proposed, and should be agreed between the Council and applicant on a case-by-case basis. In all cases the local planning authority should adopt a pragmatic and reasonable approach with regard to the scope and detail of evidence required in support of planning applications. Setting a lower impact threshold in this case will provide the local planning authority with the flexibility, as decision-taker, to assess whether an RIA is needed on a case by case basis.

Conclusions

- 22.70 In conclusion, we have identified a number of potential development opportunity sites in the main centres that we consider could accommodate the Borough-wide and centre-specific forecast need for new retail, leisure and other town centre uses over the plan period. However the exact mix of uses, phasing and scale of floorspace provided would need to be subject to more detailed assessment to cover, inter alia, land assembly, market testing, transport and design issues.

23 WEST DORSET - KEY FINDINGS & RECOMMENDATIONS

- 23.1 This final section provides a summary of the key findings of the *Joint Retail and Commercial Leisure Study* that are relevant to plan-making and decision-taking in the West Dorset local authority area. It sets out high level advice on how the Council can effectively plan for, manage and promote the vitality and viability of its main centres over the development plan period; namely Dorchester, Bridport, Sherborne, Lyme Regis, Poundbury and Beaminster.
- 23.2 Our advice is informed by the updated quantitative and qualitative need assessment new retail (comparison and convenience goods) floorspace and commercial leisure uses up to 2036. The need assessment draws on a robust and up-to-date evidence base and new primary research, including:
- A health check of the main centres;
 - A telephone interview survey of some 1,200 households across a widely defined Study Area – that includes the North Dorset, West Dorset and Weymouth and Portland Council areas - to help establish current shopping patterns, leisure preferences, market shares and turnover levels.
 - An in-centre ('face-to-face') survey of some 87 shoppers and visitors to Dorchester to help better understand their views and perceptions of the town as an important shopping and leisure destination.
 - Wide-ranging engagement with key stakeholders with a vested interest in the planning, management, development and performance of the main centres, including a stakeholder workshop held on January 9th 2018.
- 23.3 The study has been prepared in the context of national and development plan policy guidance, as well as other key material considerations. This includes the *National Planning Policy Framework* (NPPF) and the *Planning Practice Guidance* (PPG), which place weight on the development of positive plan-led visions and strategies for town centres, and promote new investment and development in town centres first ahead of edge and out of centre locations.
- 23.4 Based on the key evidence and findings of this study, this section provides a brief summary of:
- each centres' relative health, role and function, and any potential (qualitative) weaknesses and/or 'gaps' in their retail and leisure offer;
 - the quantitative need (or 'capacity') for new retail (convenience and comparison goods) floorspace and other main leisure and town centre uses over the plan period;
 - a high level assessment of the availability and suitability of in-centre, edge and out of centre opportunity sites identified by the respective local planning authorities to accommodate the forecast quantitative and qualitative need for new retail floorspace and leisure uses over the plan period (where a need has been identified);
 - the setting of a reasonable and robust impact 'threshold' in accordance with the NPPF (paragraph 26) and PPG that will allow the Council to assess and understand any likely impacts from new edge and out of centre applications on the vitality and viability of each main centre;
 - recommendations for primary and secondary shop frontages, as well as the definition (where appropriate) of a suitable Primary Shopping Area (PSA); and
 - recommendations for maintaining and/or changing the current definition of the retail hierarchy to better reflect existing and future shopping and trading patterns, and the potential for new development.

- 23.5 By way of explanation, the assessment of the potential for the identified development opportunity sites in each centre to meet the forecast scale and type of new retail, leisure and other town centre uses needed over the plan period has been carried out in accordance with the sequential approach set out in the NPPF (paragraph 23) and PPG. In brief, as described in Section 2, the sequential test guides main town centre uses towards town centre locations first, then, if no town centre locations are available, to edge of centre locations⁵⁵, and, if neither town centre locations nor edge of centre locations are available, to out of town centre locations; with preference for accessible sites which are well connected to the town centre. This test is important as it supports the viability and vitality of town centres by placing existing town centres foremost in both plan-making and decision-taking. In plan-making, the sequential approach requires a thorough assessment of the suitability, viability and availability of locations for main town centre uses. It also requires clearly explained reasoning if more central opportunities to locate main town centre uses are rejected. The NPPF (paragraph 23) is clear that it is important that needs “...are met in full and are not compromised by limited site availability”, and it advises that local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites.
- 23.6 It is against this background that we set out below our main findings and recommendations to help inform plan-making in West Dorset, specifically focusing on positive policies that will help with the management and growth of competitive town centres over the plan period in compliance with the NPPF.

Retail and Leisure Needs Assessment

- 23.7 **Section 19** assessed the overall quantitative need ('capacity') for new retail (convenience and comparison goods) floorspace in West Dorset and its main centres/stores over the development plan period, up to 2036.
- 23.8 The retail capacity assessment is informed by CJ's **CREAT[®]** Capacity Model. This model has been designed and developed by CJ over a number of years to help identify the need for new retail floorspace and to test the impact of new floorspace on the trading/turnover performance of existing centres and stores.
- 23.9 The retail capacity assessment is underpinned by robust evidence (principally the household survey) and forecasts (sourced from Experian Business Strategies and the Councils). In line with standard approaches, the capacity forecasts assume that the retail market is in '*equilibrium*' at the base year (2017) and that market shares remain constant over the study period.
- 23.10 It is important to restate at this point that capacity forecasts beyond five years should be interpreted with caution. This is because they are based on various layers of assumptions and forecasts with regard to changes in the national and local economy; the trading performance of existing centres and stores; the growth in population and retail spending; etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could further 'dampen' the future demand and capacity for new (physical) floorspace over the long term. The Councils should therefore take into account these margins for error when assessing the need for new retail floorspace over the medium term (5-10 years) and long term (10 years plus), and should regularly review and 'refresh' the forecasts to take account of changes in the baseline assumptions and forecasts.
- 23.11 The tables below summarise the forecast need for new convenience and comparison goods (net) floorspace over the plan period, up to 2036.

⁵⁵ By way of clarification the NPPF explains in the Glossary (Annex 2) that for retail purposes, edge-of-centre is defined as a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.

Table 21.1: West Dorset DC: Convenience Goods Capacity (Net) by Locations – New Superstore Format (sqm)

	2021	2026	2031	2033	2036
Dorchester	209	365	391	461	570
Bridport	46	97	122	143	175
Lyme Regis	17	38	48	56	68
Sherborne	23	34	37	44	54
Beaminster	12	16	19	23	28
All smaller villages/local centres	76	140	155	181	221
All Out-of-Centre	-795	-365	-245	-55	239
TOTAL WEST DORSET LPA - CONVENIENCE GOODS CAPACITY	-411	325	527	852	1,354

Table 21.2: West Dorset DC: Comparison Goods Capacity (Net) by Locations (sqm)

	2021	2026	2031	2033	2036
Dorchester	1,199	3,305	4,741	5,570	6,859
Bridport	502	1,331	1,897	2,224	2,731
Lyme Regis	45	119	170	199	245
Sherborne	229	607	865	1,013	1,245
Beaminster	18	48	68	79	98
All smaller villages/local centres	24	64	92	107	132
All Out-of-Centre	-1,958	-1,746	-1,602	-1,519	-1,389
TOTAL WEST DORSET LPA AREA WIDE COMPARISON GOODS CAPACITY	58	3,728	6,231	7,675	9,920

- 23.12 For **convenience goods** ('superstore format') floorspace only, the table shows that there is no capacity for new convenience goods floorspace in the District between 2017 and 2021 after taking account of all known commitments. The District-wide capacity increases thereafter to 325 sqm net in 2026 (which could support one small convenience store); 527 sqm net in 2031 (up to two convenience stores); 852 sqm net by 2033 (either circa three convenience stores, or a small superstore format); and 1,354 sqm net by 2036 (which could support circa 4 convenience stores, or a smaller superstore format).
- 23.13 For **comparison goods** the table shows there is limited District-wide capacity for 58 sqm net of new comparison goods floorspace between 2017 and 2021 after allowing for all known commitments. The forecast capacity increases thereafter to 3,728 sqm net by 2026, 6,231 sqm net by 2031, 7,675 sqm net by 2033 and 9,920 sqm net by 2036.
- 23.14 We assess the ('disaggregated') capacity for new retail floorspace in the District's main centres and smaller local centres/villages in more detail below.
- 23.15 With regard to out-of-centre retailing, after taking account of all known commitments, the retail assessment shows that there is limited capacity for new convenience goods floorspace outside of existing centres at 2036 (239 sqm net), and no capacity for new out-of-centre comparison goods retail. This need should be directed to town centre and edge of centre locations first, in accordance with the sequential approach set out in the NPPF. However, this does not mean that there will be no market demand and/or applications for new out-of-centre retail floorspace over the plan period. The Council will therefore need to put in place robust development management policies in accordance with the NPPF (paragraphs 24-27) that will enable the assessment and determination of any future applications that are not in a centre and not in accordance with an up-to-date development plan. Any future applications would need to satisfy both the sequential and impact tests, and any other material policies pertaining to specific sites and areas.
- 23.16 **Section 20** of this study broadly assesses the quantitative and qualitative need for new commercial leisure uses across the study area and three local authority areas, and identifies any significant 'gaps' in provision. It is important to restate at the outset that forecasting the need for new commercial leisure uses is more

complicated and problematic than for retailing. This is because the leisure sector is highly dynamic, and particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently the methods and approaches developed to forecast the need for new commercial leisure floorspace and uses are more wide-ranging and generally less sophisticated than for retail capacity forecasts. Furthermore, as for retail, the broad forecasts of the quantitative and qualitative need for new leisure uses and floorspace are highly dependent on market demand for representation in centres and areas. For example, just because there is a forecast (economic) need or 'gap' in provision at the local level does not necessarily mean that commercial leisure operators will automatically have requirements, or be seeking space. Stimulating market demand will depend on a number of factors; ranging from marketing the opportunities, to providing the right sites/buildings, in the right locations at the right time that meet the needs of modern commercial leisure operators. These opportunities will most likely be in the form of mixed use highly sustainable developments, generally characterised by a range of retail, office, commercial leisure and residential uses.

23.17 Against this background, the leisure assessment for West Dorset has broadly identified the following needs:

- The potential need for 2 new cinema screens over the plan period. However, given the relatively good provision of cinemas in Dorchester and the choice of cinema screens in the District's other main centres (i.e. Bridport, Beaminster and Lyme Regis), we consider that this forecast need would be best met in North Dorset and its main centres. This would necessarily be subject to more detailed market testing.
- A potential need for between 7,183 sqm gross and 17,824 sqm gross of new food and beverage outlets (including cafés, restaurants, pubs and wine bars) up to 2036. This will be subject to market demand and the potential for new mixed use development opportunities to accommodate a large proportion of this forecast need.
- A potential need for possibly one or two budget gym or health/fitness centre over the plan period; subject to market demand.
- The potential to improve the overall quality and offer of other commercial leisure uses, tourist/visitor accommodation (including hotels) and cultural attractions/facilities across the study area and its main centres, subject to market demand investment potential.

Dorchester

Needs Assessment

23.18 Dorchester is defined as a 'Main Town Centre' in the adopted *West Dorset, Weymouth and Portland Local Plan*. It is the largest centre within West Dorset, with a diverse range of retail, leisure, cultural and community uses and facilities serving both the local population and visitors to the centre. In our view, it is performing well in its role as a main town centre in the retail hierarchy.

23.19 The town centre follows a 'T' shape, with the main shopping areas comprising Trinity Street, High West Street, High East Street and South Street/Cornhill. The centre's shopping environment benefits from the pedestrianisation of Cornhill/South Street. Overall the town centre's historic character and buildings are a key feature, and help to create an attractive and distinctive town centre.

23.20 The centre's food and convenience goods provision is anchored by Waitrose and Co-op, along with a Marks and Spencer Food Hall and a mix of smaller independent businesses. The main out of centre provision includes a Tesco superstore off Weymouth Avenue to the south of the town centre; a Lidl discount store to the north, off Westleaze; and a smaller Sainsbury's Local on Bridport Road. There are a number of national operators not currently represented in the town centre, including Morrisons and Aldi. Sainsbury's also does not have a larger format foodstore.

23.21 The majority of the District-wide capacity for new convenience retail floorspace is focussed on Dorchester. Notwithstanding this, the forecast quantitative need is relatively limited; 365 sqm net in 2026, increasing to 570

sqm net by 2036. This scale of floorspace could probably support a smaller convenience store (such as operated by Tesco Express, Sainsbury's Local and Co-op, for example), or an extension to an existing store or stores. In summary, although we consider that Dorchester has an adequate choice of food stores and there is limited quantitative need for new floorspace over the plan period, there are some national grocers that are not represented in the town, and there may therefore be scope to attract and accommodate a new foodstore, subject to the identification of suitable sites that are likely to become available over the plan period..

23.22 In terms of its comparison retail offer, Dorchester has a relatively good representation of goods as well as a good mix of independents and national multiples. Its non-food offer is anchored by Marks and Spencer and Goulds, an independent department store. The majority of the District-wide capacity for new comparison goods floorspace is focussed on Dorchester. There is a potential need for 1,199 sqm net in 2021, increasing to 3,305 sqm net by 2026, 5,570 sqm net by 2033 and 6,859 sqm net by 2036. This need could potentially be met over the short (up to 2021) to medium term (up to 2026) though possible infill development and/or change of use applications. However, given the scale of need forecast up to 2036, we advise that the Council will need to identify a site, or more likely sites in and/or on the edge of Dorchester to meet the forecast need in full over the plan period in compliance with the NPPF (paragraph 23). We consider the potential sites that could accommodate this need in more detail below.

23.23 The centre is well represented in terms of services. The leisure offer at Brewery Square is particularly strong. This scheme is the most recent modern development within the centre and forms part of Dorchester's key leisure offer; including a new cinema, restaurants and shops. However it is located away from the primary shopping area and the pedestrian connections between Brewery Square and the main town centre should be strengthened to help encourage linked trips and greater 'spin-off' expenditure in the town's existing shops and businesses.

Meeting Needs in Full – Development Opportunities

23.24 The local authority has identified the following three sites in Dorchester that could accommodate the forecast need for circa 570 sqm net of new convenience goods floorspace over the plan period, up to 2036, along with 6,859 sqm net of new comparison goods floorspace and other leisure uses:

- Site 1: Acland Road Car Park, Charles Street.
- Site 2: Land to west of Trinity Street.
- Site 3: Fairfield Car Park/Market

23.25 The plans showing the location and extent of these sites are set out in **Appendix 18** to this report, along with our high level review of their suitability to accommodate new retail and mixed use development over the short (0-5 years), medium (6-10 years) and long term (11 years plus). Please note that our review of the availability and suitability of these sites at the time of preparing this study was informed by evidence provided to us by the local planning authority, site visits and other relevant information, including the *West Dorset, Weymouth and Portland Local Plan 2015*.

23.26 At the outset it is apparent that each of the three development opportunity sites could accommodate a significant quantum of the forecast need for new retail, leisure and town centre uses over the plan period. In our judgement the key issues/questions that need to be addressed in this case are:

- Which site or sites represent the optimum and most viable location for new retail-led development in planning and commercial terms over the short, medium and long term?
- Which site or sites will bring the most benefits to the town centre as a whole in social, economic and environmental terms?

- Which site or sites will best help to maintain and enhance the town centre's overall vitality and viability, by increasing its competitive position and strengthening its role and function in the District's network and hierarchy of centres?

- 23.27 It should also be noted at the outset that this high level planning review can only provide our initial judgement as to the preferred location(s) for a new retail-led scheme. We strongly recommend that the Council commission a commercial Masterplan or Development and Investment Framework ('DIF') for the town centre as a whole as a priority. This commercial masterplan will not only help the Council to better understand the availability, suitability and viability of the main development sites to accommodate the forecast needs, it will also provide an opportunity to robustly test the market appetite for representation in Dorchester and assess which sites best meet the needs of key end users. Further to this, it will also provide a joined-up development and investment strategy to help guide, fund and deliver the right development, in the right location, at the right time to the overall benefit of the town centre's vitality and viability as a whole.
- 23.28 The starting point for assessing the availability and suitability of the three sites to accommodate new retail development in sequential terms is whether they are defined as being in-centre, edge-of-centre or out-of-centre. As described above, in retail planning terms, an edge-of-centre is defined by the NPPF (Annex 2) as a location that is well connected to and up to 300 metres from the primary shopping area (PSA). By definition, in-centre therefore represents all sites and locations within the PSA. Finally, out-of-centre is defined by the NPPF (Annex 2) as a location which is not in or on the edge of a centre, but not necessarily outside the urban area.
- 23.29 Based on the current extent of Dorchester's PSA, as defined on the Proposals Map, it is apparent that all three sites are within the defined Town Centre Area ('TCA' – Policy ECON 4) and can be defined as being edge-of-centre for retail planning purposes. The Charles Street and Trinity Street sites are clearly closer to the PSA and, on this basis, they represent the best opportunity in our view to provide schemes that are fully integrated with the PSA in development and design terms. That said, although the Fairfield site is located further away from the PSA, it is still only circa 240 metres from Fairfield Road (the entrance to the existing car park) to the southern tip of the PSA, at the junction of South Street with South Walks Road. Furthermore, the Brewery Square scheme adjacent to the site on the eastern side of Weymouth Avenue, along with access to Dorchester South station, has raised the profile and status of this area as a leisure and retail destination. However, a key issue raised in this retail assessment is the need to strengthen the connections between Brewery Square and the PSA to encourage greater linked trips to the benefit of the town centre as a whole. We return to this issue in more detail below.
- 23.30 A further key consideration is the fact that all three sites are important strategic car parks serving the town centre's short-stay and long-stay parking needs. The potential loss of potential car parking and revenue streams for the Council clearly requires more detailed assessment as part of a wider parking and transport strategy for the town centre. We understand that a parking and movement strategy has been carried out by the local planning authority for Dorchester and this would form an integral part of the commissioning of a Masterplan or DIF for the town centre. For the purpose of this assessment we have necessarily assumed that there is no capacity to reduce the level of parking across the town centre, and therefore existing car parking will need to be retained on the three sites as a minimum. It follows that there will also need to be some uplift in parking to meet the needs of modern larger format retailers potentially seeking representation in the town centre. This need to retain and potentially increasing on-site parking represents a significant 'barrier' to the redevelopment of all three sites in our view, and will need to be addressed by the local planning authority as a priority.
- 23.31 Turning to our broad assessment of the relative availability and suitability of the three key sites to accommodate new retail-led development, the following provides a brief summary of the pros and cons for development based on our review of the available evidence.

- 23.32 The **Charles Street** (Acland Road Car Park) is owned by West Dorset District Council and extends to approximately 0.72 ha. It has been identified as a retail expansion area for the town centre since 1986, and Policy DOR4 of the adopted Local Plan allocates the site for new retail development with ancillary mixed uses. The most recent planning consent granted in 2010 to Simons Estates allowed for a scheme of 20,810 sqm, of which 13,471 was for new retail floorspace, to be served by 484 parking spaces at basement level. The Council offices and library (5,200 sqm) were subsequently developed out as part of Phase 1 of the scheme, but the retail-led Phase 2 of the scheme was not delivered. Apart from the impact of the economic recession on scheme viability, we understand that further barriers to retail-led development included the need to maintain existing parking on the site (including the cost of providing undercroft parking) and a range of other planning and development issues (including the scheme's archaeological impact and the cost of works required). Based on our review of the evidence we understand that any redevelopment of the site would not necessarily be viable with undercroft parking, due to the costs involved, and therefore some form of above ground multi-level parking would be necessary to help “free up” part of the site for new retail floorspace. Although we have not carried out any detailed analysis ourselves, we understand that the site could, as a minimum, accommodate new retail floorspace of approximately 2,000 – 2,500 sqm gross, with circa 200 parking spaces. It is therefore our view, based on the available evidence, that the site probably best lends itself to a foodstore development. This would also help to meet the quantitative and qualitative need identified over the plan period. This foodstore could potentially accommodate a new entrant to Dorchester (such as, for example, Aldi, Sainsbury's or Morrisons), subject to market demand; or the site may represent an opportunity for Waitrose to extend its current store at Tudor Arcade to the south, over Charles Street, or to relocate into a new larger store on the Charles Street site. However, there are a number of “ifs” and “buts” at this stage that will require more detailed feasibility and market testing as part of any Masterplan process.
- 23.33 With regard to the site to the west of **Trinity Street**, this Council-owned car park lies adjacent to The Forum Centre and the Co-op's (formerly occupied by Kwiksave and Somerfield) car park. The site is in a broad 'Z' shape and extends to approximately 0.62ha. The site is allocated for retail development as an extension to the PSA by Policy DOR5 of the adopted Local Plan. Based on the evidence we are aware of a number of potential barriers to the comprehensive redevelopment of the site, including:
- the general site layout and configuration does not, in our view, lend itself to viable new large format retail-led development, as the site does not have sufficient frontage or visibility on to Trinity Street;
 - the location of the site within the town's Conservation Area and its proximity to a number of Listed Buildings, as well as areas of historic and archaeological importance;
 - the site suffers from subsidence and unstable ground conditions that would impact on the overall development costs; and
 - the need to retain and potentially increase on-site parking to serve the needs of new retail-led development. This would have to be in the form of multi-level parking and may not be viable in commercial or planning terms given the site's setting.
- 23.34 As a result of these potential constraints to development, we conclude that the site as currently defined probably lends itself to a larger format retail unit of up to circa 1,000 sqm and assuming a multi-level car park.
- 23.35 In our judgement, the development potential of the site would be significantly enhanced in planning and commercial terms if the envelope of the site could be extended to include The Forum Centre and car park to the north (which opened in 1994 and extends to circa 2,140 sqm) as a minimum. Further to this, the potential acquisition of the Iceland unit and other units with frontage on to Trinity Street would provide the opportunity for the comprehensive redevelopment of the site to meet the needs of modern retailers. However the acquisition of The Forum Centre and overall land assembly would be costly for the Council, and may not be a viable option. If this is the case, and the Trinity Street site is as currently defined, then we advise that the Trinity Street site could meet the forecast need for new comparison goods floorspace over the short term, up

to 2021, of 1,199 sqm net; but it would not be capable of meeting the forecast need for 6,859 sqm net of new comparison goods floorspace over the entire plan period, up to 2036.

- 23.36 This leaves the **Fairfield Road** development opportunity site as the third alternative to accommodate new retail-led development in the town centre; albeit that this edge-of-centre site is located further away from the PSA than the Charles Street and Trinity Street sites. The site extends to approximately 2.2ha and is therefore significantly larger than the other town centre sites. It currently functions as a 512-space (short and long stay) car park, and also comprises the weekly Wednesday Market to the north of the site, a café and Dukes Auction House. It also hosts a Sunday car boot market. We understand that the Council owns the freehold of the Market, Middle Fairfield and Little Fairfield. Adjacent to the site, to the east of Weymouth Avenue, is the Brewery Square leisure scheme, which opened in phases between 2012 and 2016 and has a total floorspace of circa 15,800 sqm (of which approximately 3,437 sqm is for Class A1 retail).
- 23.37 As for the other town centre sites there are a number of challenges to providing new retail-led development of this site. This will include the need to retain and enhance existing car parking provision on-site, most likely in a multi-storey car park over 2 to 3 levels. Other potential planning and design ‘barriers’ to development will include: (i) the site’s location within the Dorchester Conservation Area; (ii) the treatment of the Dukes Auction House, which is a “locally significant building”; and (iii) any archaeological investigation and works that may be required. Based on the evidence we understand that the site could support a retail scheme of circa 9,290 sqm to 11,600 sqm gross (i.e. 100,000 – 125,000 sqft), including mezzanine levels. This would be equivalent to a net sales area of between 6,970sqm to 8,700 sqm net, and would more than meet the forecast need for some 6,859 sqm net of new comparison goods floorspace over the plan period. There may also be potential site capacity to accommodate other uses above ground floor level as part of the wider redevelopment of the site; such as a hotel and/or budget 24-hr gym. However, we advise that the viability of new retail-led development on this site in planning and commercial terms would need to be subject to more detailed testing as part of the recommended Masterplan process. Critical to this viability testing will be a better understanding of current market interest from potential end users for representation on this site, and their broad requirements in terms of store size, layout, servicing and parking.
- 23.38 In summary, we consider that all three sites identified by the local planning authority have, to varying degrees, the potential to accommodate some of the identified need for new retail, leisure and town centre uses over the plan period. Based on our current understanding and assessment of the constraints to development on each of these sites, we consider that:
- the **Charles Street** site probably presents the best opportunity to meet the need for a new foodstore in the town centre; either in the form of an extended or relocated Waitrose, or as a potential location for a new operator not currently represented in the town centre (such as, for example, Aldi, Morrisons or Sainsbury’s).
 - the location, layout and configuration of the **Trinity Street** site represents a barrier to major new retail-led development on this site. Unless the Council is able to assemble a larger site, to incorporate The Forum Centre as a minimum, then we consider that the current site can only probably accommodate up to 1,000 sqm of new retail floorspace.
 - the **Fairfield Road** site currently represents the most compelling location in commercial terms at present to accommodate the forecast need for new comparison goods floorspace in the town centre over the plan period. Subject to addressing any potential planning, design and parking/highway barriers to the comprehensive redevelopment of this site, our main concern with providing major new retail floorspace in this edge-of-centre location (that is clearly not as well connected to the PSA as the other two more central sites) will be the need to satisfy the impact test set out in paragraph 26 of the NPPF; namely that a retail-led scheme will not have a significant adverse impact on the town centre’s overall vitality and viability, including on in-centre trade, consumer choice and any existing, committed and planned investment in the town centre. There is a clear and present risk in this case that allowing new larger format retailing at Fairfield Road will also result in the potential relocation of some of the town’s key anchor retailers from smaller units in the PSA. The implications of these potential relocations for the town

centre's vitality and viability will therefore need to be carefully considered and assessed by the local planning authority as part of any potential future planning application for the site.

- 23.39 Finally, our advice is caveated by the fact that more detailed feasibility and market testing will be needed for each opportunity site. As explained above, we advise that this further detailed testing should ideally be “*wrapped up*” within the preparation of a commercially-led Masterplan or Development and Investment Framework for the town centre as a whole.

Definition of Frontages and Primary Shopping Area

- 23.40 The Proposals Map currently defines the Town Centre Area ('TCA'), Primary Shopping Area ('PSA'), Primary Shopping Frontages ('PSF') and Secondary Shopping Frontages ('SSF'). Based on our health check and audit of the centre, and site visits, we recommend that the existing defined TCA and PSF are robustly defined and should be retained.
- 23.41 We advise that the PSA is amended and extended to include units located at the northern and southern ends of Trinity Street to include nos. 42-44, 2-6, 5-14. We also recommend an extension of the PSA at High Street East to include units 22-25 as well as the Corn Exchange up to no. 35.
- 23.42 In terms of the SSF, we advise that there is potential to extend the coverage to the eastern end of High East Street to include units 41-52 along the northern side of the street, and units 12-4 along the eastern side of the street. Based on the findings of the health check, we also consider that the SSF could be extended to include Brewery Square, to comprise the units within the main square (including the cinema, restaurants and retail units) as well as the units along Weymouth Avenue, including the health centre.
- 23.43 Over time, dependent on the potential regeneration of the Charles Street, Trinity Street and Fairfield Road sites for new retail and mixed use development, we consider that the PSA and frontages should be reviewed and potentially extended to include these sites. We do not advise that the PSA and frontages are extended in advance of any redevelopment, as it will prevent the local planning authority from robustly assessing the potential impact of any proposed retail floorspace on the town centre's overall vitality and viability, in line with the NPPF (paragraph 26).

Bridport

Needs Assessment

- 23.44 Bridport is defined as a 'Town Centre' by the adopted Local Plan. It performs an important role as the retail and service centre for a large surrounding rural area in the west of the district. The health check findings concluded that Bridport is successfully fulfilling its town centre role and function in the network and hierarchy of centres.
- 23.45 The main town centre uses are concentrated along West Street, East Street and South Street.
- 23.46 The health check has identified that Bridport has a relatively good range and choice of food and convenience stores. The town centre's offer is anchored by a Waitrose and is supplemented by a number of local independent retailers. There are also a number of out-of-centre foodstores serving the local catchment population, including a Morrisons and Lidl. The retail economic capacity assessment identified a limited need for new convenience goods floorspace over the plan period; 46 sqm net by 2021 increasing to 122 sqm net by 2031 and 175 sqm net at 2036. This need could potentially be met through a new small convenience store, or the extension of existing stores (where viable).
- 23.47 Bridport also has a relatively good non-food retail provision. There are a range of quality independent retailers trading in the town centre, alongside more high profile national multiple retailers. There is more substantial

forecast capacity for new comparison goods floorspace over the plan period; 502 sqm net over the short term, up to 2021, increasing to 1,897 sqm net by 2031 and 2,731 sqm net by 2036. The Council will therefore have to consider how best to meet this need as part of its plan-making. This could be achieved through infill development and/or change of use applications, but it may also be necessary for the Council to identify a site or sites to meet the identified need in full over the plan period. We consider the potential availability and suitability of potential sites identified by the Council in more detail below.

- 23.48 The retail offer is complemented by a popular street market which is held twice a week along the three main streets. There are a wide selection of stalls selling both non-food goods and food goods including antiques and artisan goods. The market is recognised as being a big draw for visitors to Bridport and is well known across the district. Additionally there are many community events that take place in the town centre across the year.
- 23.49 Bridport is well represented in terms of financial services with the majority of high street banks situated within the town centre. There are also a range of cafés and restaurants in the town centre as well as a theatre and cinema and museum. Given the size of the centre we consider that the number of arts and cultural facilities is strong. The town centre attraction and ambience also benefits from its historic environment and buildings.

Meeting Needs in Full – Development Opportunities

- 23.50 The local authority has identified the following two sites in Bridport that could together have the potential to accommodate the forecast need for circa 175 sqm net of new convenience goods floorspace over the plan period, up to 2036, along with 2,731 sqm net of new comparison goods floorspace and other leisure uses:
- Site 1: Tannery Road Bus Station/ Coach Station Car Park.
 - Site 2: Rope Walks Car Park.
- 23.51 The plans showing the extent of these sites are set out in **Appendix 18** to this report, along with our high level review of their suitability to accommodate new retail and mixed use development over the short (0-5 years), medium (6-10 years) and long term (11 years plus). Please note that our review of the availability and suitability of these sites at the time of preparing this study was informed by evidence provided to us by the local planning authority, site visits and other relevant information, including the *West Dorset, Weymouth and Portland Local Plan 2015*.
- 23.52 The **Tannery Road Bus Station / Coach Station Car Park** extends to approximately 1ha and is owned by the local planning authority. This edge-of-centre site is allocated in the Development Plan under Policy BRID4 (along with the Rope Walks Car Park) for future Town Centre expansion; although any scheme would be dependent on the relocation of the bus station and depot, and would also need to retain an appropriate amount of town centre car parking on site. The design and development of this site will also be influenced by its location within the town's Conservation Area and the River Brit, which runs along the western edge of the site. In this context, we have been advised by the Council that the site is likely to be available for redevelopment over the medium term (6-10 years). Overall we concur with previous assessments of this site that have identified its potential for larger format retail.
- 23.53 Turning to the **Rope Walks Car Park** (site 2), the main land uses comprise a surface car park (c.150 spaces), service yards and stores, and a mix of industrial buildings and a car repair outlet. The site extends to approximately 0.4ha and is also owned by the local planning authority. As described above it is also allocated in the Development Plan under Policy BRID4 for future Town Centre expansion. As for Site 1, the car park is located in the town's Conservation Area and there are a number of listed buildings adjacent to it. In our view there are a number of significant barriers to the comprehensive and timely redevelopment of the site; not least land assembly and bringing together the different (non-Council) ownerships. The site is also relatively isolated, with no frontage or visibility on to the town's main shopping streets. This could further dampen market interest

in the site for new retail and commercial leisure uses. In our view the site's viable redevelopment potential for retail will depend on strengthening existing routes to the site, or ideally creating a new route off West Street. However the second preferred option would involve further land assembly, and may not be viable.

- 23.54 Although we are aware that previous work has been undertaken in the past to assess the feasibility and viability of mixed use development on the two main town centre sites⁵⁶, we advise the Council that they should prioritise the preparation of a Masterplan or Regeneration and Investment Prospectus ('RIP') to update previous work, and specifically to test the viability of different development options, and, critically, the market interest from potential end users for representation in the town centre generally, and on these sites in particular. If a Masterplan or RIP is commissioned, we also advise that it should cover a wider area than just Sites 1 and 2. In our judgement there could be potential to assemble a larger site to the south of the bus/coach station on Tannery Road, including the Rope Walks Car Park site (site 2), which would enable a more comprehensive regeneration of the town centre and help to generate stronger pedestrian linkages and access routes through to the prime shopping area on West Street and South Street. Although we appreciate that by extending the site this would include wider land ownerships, and would make site assembly potentially more complex. We also understand from the Council that St Michaels has planning permission (ref: WD/D/16/002852 and 1/D/11/002012), which will make it more difficult to implement the wider comprehensive regeneration of the site. Notwithstanding this, we consider that the opportunity to deliver a "once-in-a-lifetime" regeneration of the southern part of the town centre is worthy of more detailed consideration and assessment at this point in time.

Definition of Frontages and Primary Shopping Area

- 23.55 The Proposals Map currently defines the Town Centre Area ('TCA'), Primary Shopping Frontages ('PSF') and Secondary Shopping Frontages ('SSF'). Based on our health check and audit of the centre, and site visits, we recommend that the existing defined TCA is retained.
- 23.56 We advise that a PSA should be defined in compliance with the NPPF, but that this should broadly replicate the TCA, albeit it is not extended to the full extent of the TCA at peripheral locations.
- 23.57 We suggest that the SSF along the northern side of the southern end of West Street should be extended, and the PSF contracted, to include units 15-7 (up to, but not including Boots) due to the units being occupied by predominately service uses. We also recommend that along East Street, the PSF is contracted and the SSF is extended to include units 16-36.

Sherborne

Needs Assessment

- 23.58 Sherborne is classified as a 'Town Centre' in the adopted Local Plan. The health check assessment has demonstrated that overall the town has a good range of shopping and leisure facilities for a centre of its size. Vacancy levels are also below the national average, which confirms that the centre is performing well and market demand for representation in the centre is strong. In our view Sherborne is therefore fulfilling its important role and function in the District's network and hierarchy of centres.
- 23.59 Sherborne is a traditional historic town centre and its retail and town centre uses are mainly focused along Cheap Street.

⁵⁶ For example, the Bridport South West Quadrant Regeneration Framework 2002.

- 23.60 The town's foodstore offer is anchored by Waitrose, with Sainsbury's located just outside of the town centre boundary near to the railway station. Overall the town's food and convenience goods provision is strong and serves the needs of the local catchment population. The retail capacity assessment forecasts limited need for new convenience goods floorspace over the plan period; 23 sqm net in 2021, increasing to 37 sqm net by 2031 and 54 sqm net by 2036. This need could be met in full through modest extensions to existing foodstores (if viable), or through the opening of a small convenience store in the town.
- 23.61 In terms of comparison provision, the centre has a good representation of a range of goods comprising both independents and national multiples; including, for example, Joules, Fat Face and Edinburgh Woollen Mill. The retail capacity assessment has identified a need for 229 sqm net of new comparison goods floorspace in the town centre at 2021, increasing to 1,013 sqm net by 2033 and 1,245 sqm net by 2036.
- 23.62 The town's overall food and non-food offer is supplemented and complemented by several markets.
- 23.63 Whilst the provision of retail and financial services in the town is good, the provision of leisure services is below the national average. There is therefore an opportunity for improvements to help attract visitors to the centre and increase dwell times.
- 23.64 Overall, Sherborne has an attractive environment; the traditional historic town centre, and well-maintained shop fronts and planters enhance the town centre.

Meeting Needs in Full – Development Opportunities

- 23.65 The local authority has identified the following sites in Sherborne that cumulatively could have the potential to accommodate the forecast need for circa 54 sqm net of new convenience goods floorspace over the plan period, up to 2036, along with 1,245 sqm net of new comparison goods floorspace and other leisure uses:
- Site 1: Newland Car Park (South and North).
 - Site 2: Old Market Yard Car Park.
- 23.66 The plans showing the extent of these sites are set out in **Appendix 18** to this report, along with our high level review of their suitability to accommodate new retail and mixed use development over the short (0-5 years), medium (6-10 years) and long term (11 years plus). Please note that our review of the availability and suitability of these sites at the time of preparing this study was informed by evidence provided to us by the local planning authority, site visits and other relevant information, including the *West Dorset, Weymouth and Portland Local Plan 2015*.
- 23.67 The Newland Road Car Park (North and South) is owned by the local planning authority. Car Park North is located outside the defined Town Centre Area ('TCA') and Car Park South is within the TCA, adjacent to Waitrose. Both sites are allocated in the Development Plan under Policy SHER2 for future Town Centre expansion; although any scheme would need to retain the existing level of strategic town centre car parking on site. The design and development of these sites for new retail would also need to be sensitive to their location in the town centre's Conservation Area, and the impact on surrounding uses and listed buildings. Based on our health checks and site visits we advise that the development of either of these car park site for new retail-led development would be difficult, and may not be viable. For example, although the Car Park South site represents the preferred option for redevelopment, given its location adjacent to the existing Waitrose, retaining car parking on this site would mean that it would have to be provided above ground floor level and this may not be viable in our view. A further option for this site could be if Waitrose is seeking to extend its existing store, possibly to provide a wider non-food offer. Either way, we advise the Council that more detailed feasibility and market testing is required for this site to better understand the potential development options and the likely timescales for delivery, if viable. This could be carried out in the form of a development prospectus.

- 23.68 The second site, the Old Market Yard Car Park, is a short-stay 'pay-and-display' car park located off Hound Street, to the east of Cheap Street and south of Waitrose and the Newland Car Park South. The main access to the site is via Hound Street, and it does not appear to have direct pedestrian access to Cheap Street. Although no detailed information has been provided by the Council with regard to the site's development potential, we presume any redevelopment scheme would need to retain the existing important short-stay parking. Other potential barriers to redevelopment that we are aware of include the car park's location in the town's Conservation Area, and the surrounding uses, including listed buildings. There are also a number of mature trees on the site which, by virtue of their location within the conservation area, will be protected and may be subject to TPOs. Based on our high level review, and the limited information made available to us, we do not consider that this car park site by itself naturally lends itself to potential major new retail or mixed use development, particularly if the car parking needs to be retained. However, if other buildings immediately to the west of the site can be incorporated into the overall development site area (namely the toilet block and two stand-alone buildings; one of which we believe forms part of the Post Office), then this may make new retail more viable, with the further potential to create a direct route through to Cheap Street via the Post Office. We therefore advise that discussions are held with the Post Office to better understand their future aspirations for the building and associated sorting office over the short, medium and long term.

Definition of Frontages and Primary Shopping Area

- 23.69 The Proposals Map currently defines the Town Centre Area ('TCA'), Primary Shopping Frontages ('PSF') and Secondary Shopping Frontages ('SSF'). Based on our health check and audit of the centre, and site visits, we recommend that the existing defined TCA and PSF are appropriate and should be retained. We also advise that a PSA should be defined in compliance with the NPPF, but that this can replicate the area covered by the TCA
- 23.70 In terms of the defined Secondary Shopping Frontages, we consider that the White Hart public house and no. 2 The Green, located on the western side of The Green, should be included in the SSF, along with The George public house (nos. 1-9 Cheap Street). We also recommend that the SSF is extended along the southern side of Half Moon Street as well as the top end of Digby Road (both the east and west sides of the road).

Lyme Regis

Needs Assessment

- 23.71 Lyme Regis is classified as a 'Town Centre' in the adopted Local Plan. It is a small coastal town located within the Dorset AONB and, along with Weymouth, is one of Dorset's main principal tourist resorts. Notwithstanding the smaller size of the town centre, we consider that Lyme Regis is adequately serving the needs of its local population, as well as visitors to the centre.
- 23.72 The town centre is tightly configured with the majority of town centre uses concentrated along Broad Street.
- 23.73 Although Lyme Regis has above average convenience goods provision benchmarked against the national (Experian Goad) average, the centre is primarily serving a more day-to-day 'top-up' shopping need. The centre's food offer is principally anchored by smaller Tesco Express and Co-op stores, with a good choice of smaller independents. There is no larger supermarket situated within or outside the town centre, which means local residents have to travel to other centres/stores to meet their 'bulk' food shopping needs, or shop online. In qualitative terms Lyme Regis could therefore benefit from a larger supermarket to help meet the more 'bulk' food shopping needs of its local residents in a more sustainable location. However this would be dependent on market demand and the identification of a suitable site in and/or on the edge of the town centre that could accommodate a larger store. Notwithstanding this potential qualitative need for a new foodstore, the retail

capacity assessment has forecast a limited quantitative need for new convenience goods floorspace over the plan period; 17 sqm net by 2021, increasing to 48 sqm net by 2033 and to 68 sqm net by 2036.

- 23.74 In terms of non-food goods the centre has a good mix of quality independents as well as a mix of national multiples; including, for example, Fat Face and Mountain Warehouse. However, the health check has highlighted that many of the shops are catering for visitors and tourists; for example, there is a concentration of gift shops selling fossils, fudge and pasties. The centre would therefore benefit from a broader range of goods being sold to readjust the balance between tourist and local needs. In terms of the (economic) capacity for new comparison goods floorspace, the retail assessment has forecast the need for 45 sqm net in 2021, increasing to 170 sqm net by 2031 and 245 sqm net by 2036.
- 23.75 Notwithstanding the limited economic need for new retail floorspace in Lyme Regis, we assess below the potential for a number of opportunity sites identified by the local planning authority to accommodate new retail, leisure and town centre uses.
- 23.76 The health check identified a weak representation of financial services; the recent bank closures mean that there is only one cash point now remaining in the town centre. This is a concern given the centre's important service role. Lyme Regis has a strong leisure provision, which we consider could be further enhanced.
- 23.77 Accessibility throughout the centre is relatively poor, mainly due to the narrow roads and pavements. Despite this Lyme Regis benefits from an excellent shopping and built environment. The centre's coastal location and role as a seaside town helps to create an attractive and unique shopping environment.

Meeting Needs in Full – Development Opportunities

- 23.78 The retail assessment has identified limited (economic) capacity for new retail floorspace over the plan period, up to 2036; 68 sqm net of new convenience goods floorspace and 245 sqm net of new comparison goods retail. In our judgement this need could easily be met through the potential take-up of vacant units, the extension of existing stores (if viable), infill development and/or potential change of use applications. The scale of need forecast over the plan period does not suggest that specific site allocations for new retail/leisure development are necessary.
- 23.79 Notwithstanding this lack of quantitative need for new retail floorspace over the plan period, the local authority has identified the following sites in Lyme Regis that could together easily accommodate the forecast capacity for new retail floorspace and leisure uses:
- Site 1: Holmbush Car Park.
 - Site 2: NCP Pitt House.
 - Site 3: Broad Street Car Park.
 - Site 4: Rear of the Royal Lion.
- 23.80 The plans showing the extent of these sites are set out in **Appendix 18** to this report, along with our high level review of their suitability to accommodate new retail and mixed use development over the short (0-5 years), medium (6-10 years) and long term (11 years plus). Please note that our review of the availability and suitability of these sites at the time of preparing this study was informed by evidence provided to us by the local planning authority, site visits and other relevant information, including the *West Dorset, Weymouth and Portland Local Plan 2015*.
- 23.81 The main opportunity sites identified by the local planning authority are car parks and service yards that could lend themselves to new retail-led development; although it is likely that some, if not all of the existing parking would need to be retained.

- 23.82 Based on our high level review the Holmbush Car Park (Site 1) is a sizeable site located some 0.25 miles (circa 5 minute walk) from the northern end of Broad Street (the Co-op); although the walk from the town centre would not be easy, as it is uphill. The site is therefore defined as being out-of-centre in retail planning terms. Based on our high level assessment we consider that the site could definitely accommodate a large-scale retail unit or units that would meet the modern requirements of retailers and leisure operators. Given the natural slope of the site, it may also be possible to provide new retail units on the site, whilst maintaining existing car parking at basement or above store level. Notwithstanding the potential for the site to accommodate new retail-led development, possibly a supermarket, we advise that more detailed viability and market testing needs to be carried out to assess the development options and to further test the level of market interest and demand from food and non-food retailers for representation in the town centre, and this site specifically. If development of this site is found to be feasible and viable in commercial terms, any new retail-led scheme would thereafter need to satisfy the sequential and impact tests set out in the NPPF (paragraphs 24-27), along with any other material policies and considerations.
- 23.83 The NCP Pitt House car park (Site 2) is located behind Tesco Express on Broad Street in the heart of the town centre, with the main vehicular and pedestrian access provided between Tesco Express and Boots. The car park is relatively isolated and has no frontage on to Broad Street. Based on our high level review we consider that its potential for new retail-led development is limited, unless it is possible to “*punch through*” on to Broad Street by acquiring either the Tesco Express building and/or the Boots and Costa Coffee units. We do not believe that this is a realistic or viable option in this case, as the buildings are located in the town’s conservation area, they are listed and in active use.
- 23.84 The Broad Street car park (Site 3) has similar development constraints to the NCP Pitt House Car Park; although it does benefit from better frontage and access on to the southern end of Broad Street. In our judgement the layout and configuration of the car park, allied to the gradient, does not lend itself to a comprehensive retail-led development. There may, however, be potential for some small-scale infill development behind 67 Broad Street to help meet the limited quantitative need for new retail floorspace, and/or the potential redevelopment of 67 Broad Street and the public toilet block to provide a more modern retail/leisure unit in this prime location. However, the second option may not be financially viable.
- 23.85 Finally, based on our health check and site visits, we do not consider that the site to the rear of the Royal Lion (Site 4) lends itself to new retail or leisure led development in terms of its size, location and layout.

Definition of Frontages and Primary Shopping Area

- 23.86 The Proposals Map currently defines the Town Centre Area (‘TCA’), Primary Shopping Frontages (‘PSF’) and Secondary Shopping Frontages (‘SSF’). Based on our health check and audit of the centre, and site visits, we recommend that the existing defined TCA, PSF and SSF are appropriate and should be retained. We also advise that a PSA should be defined in compliance with the NPPF. We consider that this should broadly replicate the area covered by the TCA although the PSA has been consolidated slightly to exclude car parks to the rear of units, as well as the units beyond the Langmoor Close/Silver Street/Broad Street junction.

Beaminster

Needs Assessment

- 23.87 Beaminster is characterised by an attractive historic environment and is defined as a ‘Larger Local Centre’ in the adopted Local Plan. Given the relatively small number of shops and services serving the local population, we consider that its classification is appropriate and it is fulfilling its role and function in the retail hierarchy.
- 23.88 The main shopping streets cover Hogshill Street, Church Street and Prout Hill.

- 23.89 The centre is anchored by a Co-op store and this is supported by a number of local retailers selling food and convenience goods which together serve the 'top-up' shopping needs of residents. There is a relatively strong comparison goods representation for a centre of its size and its offer comprises predominately independent retailers.
- 23.90 The retail assessment has identified limited (economic) capacity for new retail floorspace over the plan period, up to 2036; 28 sqm net of new convenience goods floorspace and 98 sqm net of new comparison goods retail.
- 23.91 Beaminster has an adequate provision of services. However we do consider that there is scope, in qualitative terms, to improve leisure services provision in the town. There are also no banks in the town centre.

Meeting Needs in Full – Development Opportunities

- 23.92 In our judgement the forecast need for limited new retail floorspace over the plan period could easily be met through the potential take-up of vacant units, the extension of existing stores (if viable), infill development (such as, for example, 7-13 Hogshill Street), and/or potential change of use applications. The scale of need forecast over the plan period does not suggest that specific site allocations for new retail/leisure development are necessary. In any case, the historic nature of Beaminster and its very tightly configured centre, means that there are limited major development site opportunities.
- 23.93 Notwithstanding this, the local planning authority has highlighted the development potential of the Council-owned Yarn Barton Car Park site. However, from our high level review of its location, layout and configuration we consider that its suitability and viability for a new retail-led scheme is limited. Although we have no detailed information pertaining to the existing car park and its usage, we have presumed that the existing parking spaces would need to be retained, which would further limit the site's development potential in our view.
- 23.94 The Council has also identified the (0.28 ha) site to the rear of 7-13 Hogshill Street as having development potential. We understand this site is owned by Francis Bugler Ltd. The main access to the site is from Hogshill Street, with a second access from Shadrack Street; the site is within the Conservation Area. A previous application to demolish the existing workshop/store buildings on the site was granted consent in 2009 (reference: 1/D/09/001304). Previous to this the site had consent for the conversion of existing premises and construction of new buildings to provide 2 shops, 2 flats and 12 houses, along with modifications to existing vehicular and pedestrian access (reference: 1/W/03/001539), however, only part of this scheme has been implemented. Notwithstanding this, the site does have the potential for new mixed use development, potentially comprising a mix of new retail floorspace and leisure uses, along with new residential uses. However access into and out of the site would need to be carefully planned. On this point, to help facilitate better access and stronger frontage on to Hogshill Street there may be a need to acquire the building at 3 Hogshill Street ('Art Deco Café').
- 23.95 In summary therefore, we consider that the site at 7-13 Hogshill Street does by itself provide the potential to meet the limited forecast need for new retail and leisure uses in Beaminster over the plan period.

Definition of Frontages and Primary Shopping Area

- 23.96 The Local Plan does not define the Town Centre Area ('TCA'), Primary Shopping Frontages ('PSF'), Secondary Shopping Frontages ('SSF') and Primary Shopping Area ('PSA') for Beaminster.
- 23.97 Based on our health check and audit of the centre, and site visits, we recommend that a TCA is defined to include the length of Hogshill Street from no.36/23 at the western end of the street to no. 2/1 at the eastern end. The TCA should also comprise all units facing onto The Square as well as units along North Street, stretching from The Square to the funeral directors (no. 7). Along Church Street, the TCA should encompass units between The Square and nos. 4/3. The Town Council Offices should be included within the TCA to the northeast.

- 23.98 We recommend that a PSF is defined along the north, east, south and west sides of The Square as well as The Beaminster Emporium, Larcombes of Beaminster, The Village Bakery, Art Deco Café, Steak Out and the charity shop on Hogshill Street (this comprises nos. 8-2 Hogsmill Street along the northern side of the street and nos. 3-1 on the southern side of the street).
- 23.99 We advise that the SSF should include nos. 7-9 along the southern side of Hogsmill Street as well as nos. 26-10 along the northern side of Hogsmill Street.
- 23.100 The PSA should encompass the recommended primary and secondary frontages.

Poundbury

Needs Assessment

- 23.101 Since 1993 Poundbury has been developed as a 'unique' urban extension to Dorchester. It is being built out in four phases; with the final phase expected to be completed in 2025.
- 23.102 In contrast to the other centres in the district, there is no single area where retail and town centre uses are concentrated due to the architectural principals for the scheme. However, the area around Queen Mother Square, which is proposed as a 'District Centre' following its completion, does currently have the highest concentration of retail, leisure, service and town centre uses; including a Waitrose, a public house, garden centre and café. The Waitrose is a key anchor to the centre's overall vitality and viability, helping to generate daily trips, footfall and linked expenditure to Queen Mother Square generally, and specifically to other shops, services and businesses in the locality.
- 23.103 Although we do consider that Queen Mother Square has the potential to fulfil an important role and function as a District Centre in the retail hierarchy, it will be vital that any potential new demand from retailers and service operators seeking representation in Poundbury is directed to Queen Mother Square first, rather than being dispersed elsewhere. This will help to generate the critical mass of uses needed to create a commercially viable and sustainable shopping, leisure and service destination that will best meet the day-to-day needs of local residents, as well as tourists and visitors to the area. The main offer in the District Centre would then be complemented and supplemented by Poundbury's mix of smaller neighbourhood shopping parades, which would serve their more local 'walk-in' residents.
- 23.104 Given their current offer and size, the quantitative need assessment has unsurprisingly identified that there is limited capacity for new comparison and convenience goods floorspace in the district's smaller villages and local centres (including Poundbury) up to 2036; 132 sqm net of new comparison goods floorspace and 221 sqm net of new convenience goods retail. Poundbury accounts for approximately one-third of this forecast need based on its current turnover levels.
- 23.105 Turning to Poundbury's current retail composition, there is an extremely high proportion of financial and business uses due to the centre's key employment role. This ultimately skews the results for other town centre uses; for example the centre has below (Experian Goad) average provision of comparison goods and retail/leisure services. This further underlines the need to extend the range and choice of retail, leisure and service uses focussed on Queen Mother Square.

Meeting Needs in Full – Development Opportunities

- 23.106 For the reasons set out above, we consider that Queen Mother Square has the greatest potential to accommodate all the forecast (quantitative and qualitative) need for new retail floorspace and other leisure and town centre uses in full over the plan period.

Definition of Frontages and Primary Shopping Area

23.107 Currently described as an urban extension to Dorchester, the Local Plan does not define a Town Centre Area ('TCA'), Primary Shopping Frontages ('PSF'), Secondary Shopping Frontages ('SSF') and Primary Shopping Area ('PSA'). However, the Local Plan does identify that Queen Mother Square will be recognised in the future as a District Centre. We therefore advise that a TCA and PSA be defined to cover all the main existing and planned shops and services focussed on Queen Mother Square as well as no. Woodville Court, nos. 2-5 Ringhill Street and the units along the eastern side of Ringhill Street. We do not, in this case, consider it is appropriate to define primary and secondary frontages, as the centre as defined is small and we believe that frontage policies could hinder the natural growth and extension of the District Centre over time.

Retail Hierarchy

23.108 We have undertaken a high level review of West Dorset Council's centres to ascertain the centre hierarchy.

23.109 The West Dorset, Weymouth & Portland Local Plan (2015) defines Dorchester, Bridport, Sherborne and Lyme Regis as town centres and Beaminster as a Local Centre. Our assessment has revealed that all defined centres are fulfilling their role and function and as such their position within the borough's hierarchy of centres should be maintained.

23.110 Although Poundbury is currently described as an urban extension to Dorchester, the Local Plan identifies that Queen Mother Square will be recognised as a District Centre in the future. We recommend that Poundbury is only defined as a potential Future District Centre until construction of Queen Mother Square is complete.

23.111 We recommend that the Council, as part of the emerging Local Plan, clearly defines the Local Centres as part of the retail hierarchy. In order to assist the Council with identifying these centres, we have provided commentary on this level of the hierarchy. Currently, there is no definition included within Annex 2 of the NPPF. However, turning to the definition set out in Annex B of Planning Policy Statement 4 (PPS 4), now replaced by the NPPF, Local Centres are considered to have *"a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot food takeaway and a launderette. In rural areas, large villages may perform the role of a local centre"*. Therefore local centres generally provide a top up shopping role serving local needs, often anchored by a small supermarket/convenience store.

23.112 It may be the case that the Council may wish to undertake a separate study to identify such centres and review their health however we consider that the definition above will assist the Council somewhat in identifying these.

Local Impact Threshold

23.113 We have also assessed whether there is a requirement for the local planning authority to set a local (floorspace-based) impact threshold, rather than use the default of 2,500 sqm gross identified by the NPPF (paragraph 26). This is important as it will determine whether applicants should carry out an impact assessment for new retail, leisure and office development outside of town centres that are not in accordance with an up-to-date Local Plan.

23.114 In summary the Planning Practice Guidance (PPG) published in March 2014 provides advice in setting a locally appropriate threshold and states that it will be important to consider the:

- scale of proposals relative to town centres;

- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

23.115 While the quantitative and qualitative research evidence indicates that the main towns and smaller centres in appear to be vital and viable, they are nevertheless vulnerable to increased competition from out-of-centre retailing and the growth of internet shopping.

23.116 Our assessment of retail trends in **Section 3** has highlighted the dynamic growth in smaller convenience stores operated by the major grocers (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.). Although sizes vary from location-to-location, the main grocers are generally seeking new convenience stores (e.g. Tesco Express, Sainsbury's Local, Little Waitrose) with a minimum gross floorspace of circa 4,000 sq ft (372 sqm) gross. In circumstances where these smaller stores are proposed on the edge or outside of smaller local and village centres, often as part of petrol filling stations, they could result in a significant adverse impact on their trading performance, and overall vitality and viability. This will particularly be the case where smaller centres and villages are dependent on smaller supermarkets and convenience ('top-up') stores to anchor their retail offer and generate footfall and linked trips/expenditure to the benefit of other shops, services and facilities.

23.117 In addition, modern retailers selling a range of comparison goods (including fashion, homestore and 'bulky' goods retailers) generally have requirements for larger format shop units with a minimum floorspace of approximately 465 sqm (5,000 sq ft) gross. This minimum floorspace provides operators with the necessary 'critical mass' of sales needed to display their full range of goods in-store and attract customers from a wider catchment area, particularly where they are co-located alongside similar stores in town centre and out-of-centre locations. In general terms larger format non-food stores of over 465 sqm gross are also unlikely to trade as a purely local facility.

23.118 We therefore conclude in this case that it is reasonable for applicants proposing developments for new comparison and convenience goods retailing of 300 sqm gross and above to demonstrate that they will not have a significant adverse impact cumulatively with other commitments in the area, in accordance with the NPPF on any defined centre within the Council area.

23.119 In our judgement this is a reasonable impact threshold as it will provide the local planning authority with sufficient flexibility to assess the merits and implications of edge and out-of-centre foodstore applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres. We also advise that this threshold should be applied, where relevant, to change of use applications and applications seeking variations of conditions.

23.120 In our experience a 300 sqm gross impact threshold is reasonable in this case based on our experience of advising other local planning authorities, and also drawing on the minimum impact thresholds identified in recently adopted local plans (including, for example, Richmondshire District Council, Rother District Council, Rotherham Metropolitan Council, Stafford Borough Council, Warrington Borough Council and Norwich City Council).

23.121 Notwithstanding the adoption of a lower locally set impact threshold, it is important that the scope of any Retail Impact Assessment (RIA) in support of planning applications is discussed and agreed between the applicants and the Council at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate to the scale and type of retail floorspace proposed, and should be agreed between the Council and applicant on a case-by-case basis. In all cases the local planning authority should adopt a pragmatic and reasonable approach with regard to the scope and detail of evidence required in support of planning applications. Setting a lower impact threshold in this case will provide the local planning authority with the flexibility, as decision-taker, to assess whether an RIA is needed on a case by case basis.

Conclusions

23.122 In conclusion, we have identified a number of potential development opportunity sites in the main centres that we consider could accommodate the District-wide and centre-specific forecast need for new retail, leisure and other town centre uses over the plan period. However the exact mix of uses, phasing and scale of floorspace provided would need to be subject to more detailed assessment to cover, inter alia, land assembly, market testing, transport and design issues.

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