# 2 TOWN CENTRE REVIEWS

## North Wiltshire Town Centres

2.1 This study focuses particularly on the five largest town centres in the District - in order of size they are Chippenham, Wootton Bassett, Calne, Corsham and Malmesbury. Table 2.1 below shows the relative sizes of the centres, in terms of retail floorspace, and the balance of types of retail businesses operating at present.[1]

Table 2.1 : Town Centre Floorspace and Uses

| Floorspace (sq.m gross) | Chippen-ham | Wootton Bassett | Calne | Corsham | Malmes-bury | Total |
|---|---|---|---|---|---|---|
| Convenience Goods | 5270 | 3230 | 5450 | 1450 | 750 | 16150 |
| Comparison Goods | 28090 | 5000 | 4030 | 4200 | 4520 | 45840 |
| Service Uses | 10450 | 11960 | 3570 | 3710 | 2190 | 31880 |
| Vacant Uses | 3710 | 1170 | 1410 | 490 | 560 | 7340 |
| Total | 48330 | 21360 | 14460 | 10000 | 8020 | 102170 |

2.2 As Section 3 shows, the total amount of retail spending by residents of the Study Area is estimated at £1015m per year, of which £693m per year is spend on comparison goods (clothing, household goods, etc.) and £323m per year is spend on convenience goods (food, groceries, etc.). Approximately 37% of comparison spending is spent in town, district and local centres, and in freestanding stores within the District. The figure for convenience spending retained within the District is far greater at some 80%. Further analysis of these figures can be found in Section 3 of this study.

2.3 A much more detailed analysis of these figures, including assessment of the levels of spend in each town centre, and destinations of spend from local parts of the Districts, is contained in Section 3. In summary, the Section shows that

- Chippenham town centre is by far the most important comparison goods destination within the study area, accounting for almost half of all of the retained expenditure. Malmesbury, Corsham, Wootton Bassett and Calne attract only small amounts of comparison goods expenditure and represent a lower level in the hierarchy of town centres.
- The main destinations for leakage of expenditure are Swindon town centre and Bath city centre, which draw £125m and £64m respectively from residents of the North Wiltshire catchment area.
- It is clear that most convenience shopping is undertaken on a highly localised basis. 78% of the convenience expenditure of residents of the catchment area is retained and spent in stores and centres which are located within the catchment area and 21% represents short distance leakage to stores located in the buffer zones just outside the catchment area.

[1] this data is sourced from Experian GOAD, the best source of up-to-date retail floorspace data based on regular surveys of every town centre in the country. Note that GOAD data is updated regularly; for the North Wiltshire town centres data relates to Nov 2005 - June 2006. Surveys conducted for this study in March 2007 indicate that some limited change has occurred since that time, but for consistency of data and comparisons with other information, including GOAD floorspace use data, the GOAD plans in Appendix Two are presented with their survey dates. Where change has occurred it generally indicates continuing strength in retail operations, with reductions in vacancy and attractive new occupants to premises

- The convenience goods retention rate is low only for the parts of the District closest to other centres outside the District, particularly Cricklade, Wootton Bassett and Malmesbury.

## PPS6 Indicators

2.4 Planning Policy Statement 6 (PPS6) 'Planning for Town Centres' sets out a number of indicators which can be used to measure the vitality and viability and monitor the health of town centres, and how this is changing over time.

2.5 This section of the report concentrates on these indicators, using qualitative and quantitative data which is available for the North Wiltshire towns from existing sources and surveys, including data illustrating diversity of uses, retailer representation, rents and yields, vacancy, accessibility. Some of the data is drawn from surveys conducted in spring 2007 for or by Roger Tym & Partners, and from consultations with local agents; and some from established data sources, particularly GOAD surveys and plans for the town centres. Consultation with a Retail Needs Stakeholder Forum in May 2007, provided insights for the study. Plans of the Town Centres, showing the GOAD data, are provided in Appendix Two. This data was reviewed by on-street surveys during the RTP work in 2007.

2.6 Summary information for each of the centres is provided below, in respect of these "healthcheck indicators", and is then supplemented with an analysis of comment collected through a pedestrian on-street survey. This comment is provided in a separate sub-section to allow comparison of opinions about several centres.

## Chippenham

2.7 Chippenham is the largest town centre in the District, with a total retail floorspace in the town centre of 48,330 sq.m.

2.8 The GOAD data for the town centre shows the following balance of retail uses in the town centre:

Table 2.2 Chippenham Town Centre Floorspace

| Floorspace | No. of units | (sq.m gross) | % of total f'space |
|---|---|---|---|
| Convenience Goods | 13 | 5270 | 10.90 |
| Comparison Goods | 117 | 28090 | 58.12 |
| Service Uses | 91 | 10450 | 21.62 |
| Vacant and Miscellaneous Uses | 18 | 3710 | 7.67 |
| Total | 246 | 48330 | 100 |

Source: GOAD

2.9 Chippenham is an attractive town centre with a good balance of types of retail and other uses, and a good range of retailer representation. The presence of the Somerfield supermarket in the town centre is a positive contribution to this balance, and other "high street names" including WH Smith, Superdrug, Clarks, Stead & Simpson, Burton, Dorothy Perkins, New Look, etc., demonstrate its strength and role in the shopping hierarchy.

2.10 The primary retail area of the town centre is focussed on the High Street, which forms an attractive link from the Bridge to Market Place and to the secondary retail areas beyond. Environmental enhancements and part pedestrianisation have helped to create an attractive and safe environment for shoppers and other visitors to the town centre during the day and evening.

2.11 The attractive topography and riverside setting help to enhance the life and interest of the town centre, and the riverfront areas to the west of the High Street have particularly benefited from recent developments which create a quality of urban environment and diversity to the town centre.

2.12 Car parking for the town centre is provided largely in three car parks - Emery Gate (decked, adjacent to Somerfield); Borough Parade (adjacent to the modern Borough Parade shopping development); and Bath Road (across the bridge from the High Street, but very accessible to it). The latter two car parks are particularly accessible from outside the town centre and thus provide an important resource; however the access to the Emery Gate car park is narrow and awkward, creating an unfortunately poor access and poor quality of environment in a prominent location adjacent to the river (where any attractive riverside environment could contribute significantly to the attractiveness of the town centre).

2.13 Public transport accessibility is good with a large number of routes into the town centre bus station from across the District and beyond, and a good railway station close to the town centre linking to major urban centres and nearby towns. The town centre has attractive pedestrianised areas and provision of cycle racks in various places.

2.14 There is a good diversity of "other" uses in the town centre, including office premises; pubs, hotels and bars; and public facilities including the library - however, there is not a strong leisure offer beyond the restaurants, pubs and bars, so the town centre can be fairly quiet in the evenings and does not play a strong role by comparison with other adjacent larger town centres.

2.15 Property market rents and yields give a good indication of the relative strength of town centres, reflecting supply and demand. There is limited standardised data on which to compare commercial property market performance of town centres in North Wiltshire[2],

[2] While this study provides new data collected as part of the research process (which is referred to in the text), any one set of data on rents, yields, etc. is restricted in its usefulness by the limited number of transactions and other lack of information on which to judge market conditions in smaller towns. Nonetheless, the relative performance and health of the town centres can be judged from the range of data which is used.

but the following table demonstrates the comparison of Chippenham with neighbouring centres with which it competes, and shows how its relative position has changed over time:

**Table 2.3 Retail Property Zone "A" Rents, 1996 - 2006 (£ per sq. ft.)**

| Centre | Scale of Centre (VenueScore 2006) | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bath | Major Regional | 140 | 145 | 180 | 195 | 195 | 195 | 215 | 220 | 220 | 240 | 240 |
| Bristol | Major Regional | 150 | 150 | 160 | 175 | 175 | 175 | 180 | 180 | 185 | 185 | 190 |
| Swindon | Regional | 150 | 150 | 150 | 170 | 180 | 170 | 170 | 170 | 170 | 170 | 170 |
| Cirencester | Major District | - | - | - | - | - | - | - | 65 | 65 | 70 | 70 |
| Trowbridge | Major District | - | - | - | - | - | - | - | 60 | 65 | 65 | 65 |
| Chippenham | District | 40 | 40 | 40 | 40 | 40 | 40 | 45 | 55 | 60 | 60 | 70 |
| Devizes | District | - | - | - | - | - | - | - | - | - | - | - |

Source: Colliers CRE

2.16 This table indicates that Chippenham retail property is (not surprisingly) significantly less valuable than equivalent premises in the larger cities and towns in the sub-region, and marginally less attractive commercially than in Cirencester and Trowbridge. However, Colliers CRE data shows that Chippenham has experienced rental growth of 75% over 5 years between 2001 and 2006, which is the 12th highest rate of rental growth of any UK centre..

2.17 Agents confirm that rents as high as £80 per sq ft may now be achievable in the best locations, but the range is wide, and may average £50 per sq ft in a generally strong market. This picture is reflected in property yields, which are an indicator of investor confidence (the lower the figure, broadly speaking, the more attractive).

2.18 Agents confirm that yields reflect a rapidly improving market (noting again that lower yield figures reflect the stronger commercial position):

**Table 2.4 Retail Property Yields 2000 - 2007**

| Centre | Scale of Centre (VenueScore 2006) | Apr-00 | Apr-01 | Apr-02 | Apr-03 | Jan-04 | Jan-05 | Jan-06 | Jan-07 |
|---|---|---|---|---|---|---|---|---|---|
| Bath | Major Regional | 5.0 | 5.0 | 5.0 | 5.0 | 5.0 | 5.0 | 5.0 | 4.5 |
| Bristol | Major Regional | 5.0 | 5.0 | 5.0 | 5.0 | 5.0 | 5.0 | 5.0 | 5.0 |
| Swindon | Regional | 5.5 | 5.8 | 6.0 | 5.5 | 5.3 | 5.3 | 5.0 | 5.0 |
| Cirencester | Major District | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.5 | 7.0 | 6.0 |
| Trowbridge | Major District | 8.5 | 9.0 | 9.5 | 9.0 | 8.5 | 8.5 | 8.5 | 7.5 |
| Chippenham | District | 7.5 | 8.0 | 8.5 | 8.0 | 8.0 | 8.0 | 7.5 | 7.0 |
| Devizes | District | 9.0 | 9.5 | 10.0 | 9.0 | 9.0 | 8.5 | 8.5 | 7.5 |
| Melksham | Local | 10.0 | 10.5 | 10.0 | 10.0 | 10.0 | 9.0 | 9.0 | 8.0 |

Source: Colliers CRE

2.19 This table shows again the relative performance of Chippenham, with a marked difference compared to the larger cities and towns, but fairly comparable with neighbouring centres of similar size. Indeed Chippenham shows a consistently stronger performance than Trowbridge or Melksham.

2.20 It is notable that there is a very low rate of vacancy in Chippenham, and even the few shop units which were noted as vacant by GOAD in summer 2006 have been filled. Site survey and discussion with local agents indicates that most vacancies now occur in the course of normal movement in the retail property market, as occupiers move between premises or close, when a short delay occurs before new businesses take up occupancy.

2.21 Some agents report moderate demand for premises in Chippenham, while others reported stronger interest and a shortage of premises to meet modern retailer demand, particularly for units of 1,000 - 1,500 sq ft, with some interest in larger units up to 4,000 sq ft. Published commercial databases of "retailer requirements" indicate a range of requirements from high street retailers these are very similar to those found in many high streets and do not in themselves demonstrate any unusually strong demand or the potential to extend the range of the centre into different markets. Agents view the town centre's property offer as good, with a generally adequate provision of size and shape of units. Some agents felt there may be latent demand for mainly larger units in Chippenham.

2.22 The primary and secondary retail frontage areas as defined in the current Local Plan are a fair reflection of the current conditions in the town centre, with the primary frontage area focussed on the High Street between the river and Market Place and the secondary frontage area extending from Foundry Lane and New Road in the north to the Causeway in the south. The two defined areas appear generally to be appropriately drawn in terms of retailer representation, other uses, property market conditions and footfall, but should be reviewed in the light of two particular considerations - supermarkets in town centres, and the need for future development - which apply also to the other town centres and are discussed in Section 5.

## Wootton Bassett

2.23 Wootton Bassett is the 2nd largest town centre in the District, with a total retail floorspace in the town centre of 21,360 sq.m.

2.24 The GOAD data for the town centre shows the following balance of retail uses in the town centre:

**Table 2.5 Wootton Bassett Town Centre Floorspace**

| Floorspace | No. of units | (sq.m gross) | % of total f'space |
|---|---|---|---|
| Convenience Goods | 8 | 3230 | 15.12 |
| Comparison Goods | 51 | 5000 | 23.41 |
| Service Uses | 44 | 11960 | 55.99 |
| Vacant and Miscellaneous Uses | 9 | 1170 | 5.48 |
| **Total** | **112** | **21360** | **100** |

Source: GOAD

2.25 These figures reflect the significant representation of service uses and comparison floorspace in the town, though it does include a Sainsbury supermarket (1,570 sq.m), Somerfield (660 sq.m) and Iceland (580 sq.m).

2.26 Retail premises stretch along the High Street, which is a busy main road, but is an attractive, level historic street and links through the modern Borough Fields shopping centre to the Sainsbury supermarket, Library and car park beyond. The Somerfield supermarket is fairly centrally located also, fronting High Street, with a small car park behind accessed from Station Road.

2.27 There are few other high street "brands" represented other than the supermarkets (above)- Boots, Lloyds, Peacocks - so the majority of the units are occupied by local independent traders. As noted, there is a strong representation of service uses, including pubs, take-away food, insurance, travel agents, etc. Many of these uses occupy relatively small and old premises, which will be limited in their potential to accommodate modern retailer requirements.

2.28 The main area of car parking serving the town centre is the Borough Fields car park, and on street parking along the High Street is free. There is a range of public transport (bus) routes to and from larger towns including Swindon, Devizes and Chippenham and to neighbouring villages. Cycle racks are provided in some locations, and being generally flat, the centre provides good pedestrian accessibility.

2.29 The fundamental quality of environment of the town centre is good, benefiting particularly from the presence of attractive buildings and the width of the High Street. However, many of the buildings show signs of decay or lack of investment, and there is a significant representation of charity shops and vacancies in central positions - though some premises are currently being rebuilt or refurbished. Also environmental quality is compromised by a persistent flow of traffic, including heavy vehicles, along High Street.

2.30 There is a limited offer of other town centre facilities or functions, though there is a large library adjacent to the Sainsbury's supermarket and car park as part of the Borough Fields shopping centre, a range of pub/hotels and a few local restaurants, and some local offices and services including dental surgery, solicitors and banks.

2.31 Though there is a lack of standardised data for rents and yields, our consultations with local agents indicate that Zone A rents of £26 - £28 per sq ft may be achieved, with a best of £30. Yields may on average be around 7.5% - 8.0% and fairly static, but one agent indicated that a best yield of 5.5% may have been achieved.

2.32 Agents noted that free car parking (for the first two hours) is an advantage, but stakeholders raised concerns at forum discussions that the parking fee at the Sainsbury car park places the store and the centre at a disadvantage to other nearby supermarket locations.

2.33 The primary and secondary retail frontage areas as defined in the current Local Plan are a fair reflection of the current conditions in the town centre, with the primary frontage area focussed on the Borough Fields Shopping Centre and adjacent areas of the High Street and the secondary frontage area extending along the High Street. The two defined areas appear generally to be appropriately drawn in terms of retailer representation, other uses, property market conditions and footfall, but should be reviewed in the light of the issues discussed in Section 5.

## Calne

2.34 Calne is the 3rd largest town centre in the District, with a total retail floorspace in the town centre of 14,460 sq.m.

2.35 The GOAD data for the town centre shows the following balance of retail uses in the town centre:

**Table 2.6 Calne Town Centre Floorspace**

| Floorspace | No. of units | (sq.m gross) | % of total f'space |
|---|---|---|---|
| Convenience Goods | 8 | 5450 | 37.49 |
| Comparison Goods | 37 | 4030 | 27.87 |
| Service Uses | 29 | 3570 | 24.69 |
| Vacant and Miscellaneous Uses | 9 | 1410 | 9.75 |
| Total | 83 | 14460 | 100 |

Source: GOAD

2.36 Calne is unusual for a town of this size in offering two larger supermarkets - Sainsbury (2,210 sq.m gross) and Somerfield (1,880 sq.m gross) - within the town centre, as well as an Iceland store (740 sq.m gross), and adjacent to larger areas of car parking. This part of the town centre tends to dominate retail provision (providing over one-quarter of the total retail floorspace in the town centre) and the balance of shopping provision towards convenience uses when compared with the other town centres. The rest of the town centre then comprises two other main areas - Phelps Parade, a small pedestrian open 'mall' area which includes Iceland, Boots, and a range of smaller shops; and the historic areas of Wood Street and High Street. Church Street, which lies on the southern edge of the town centre, provides a particularly attractive historic area with a number of small shops selling specialist comparison goods and services.

2.37 The historic parts of the town centre present an attractive setting, which has been enhanced in recent years by the construction of a new library and adjacent development. However, while the pedestrianised area of the High Street is environmentally attractive it now comprises almost entirely office and service uses, so lacks shopper interest and footfall.

2.38 By contrast, the area around the supermarkets and car parks is unattractive due to the fragmented nature of development and layout and environment of the surface car parks. These car parks do however provide the opportunity for market trading. Stakeholders commented that the lack of free parking is a disadvantage to the centre.

2.39 Phelps Parade is also unattractive, despite being at the heart of the shopping area it is an unattractive development, dated in style and marked by litter and apparently poor maintenance and lack of investment.

2.40 There has been significant consultation between North Wiltshire District Council Assets, Design and Regeneration Team and local town and parish councils as well as other stakeholders concerning the future redevelopment prospects for Calne town centre.

2.41 NWDC has recognised the condition of Phelps Parade and officers have recommended the parts of Phelps Parade in the poorest condition should be demolished with the objective of "enhancing Phelps Parade shopping centre to increase revenue income, reduce future maintenance costs, to obtain the maximum return for its investment and to improve the amenities for the local community." This is referred to as Phase 3.

2.42 The Phase 3 development in Calne is focused on the removal of 1970's retail buildings and the general enhancement of the existing retail structure, with the concentration of shopping adjacent to the Sainsbury's store.

2.43 Phase 3 proposes to demolish the former Kwik Save store (east end of Phelps Parade) and replace with two ground floor retail units with 16 affordable flats, which replaces the 5 current situated. Refurbishment of the remainder of Phelps Parade, including the removal of canopies, paving and improvement works to shop fronts. A private development comprising 5 new retail units and flats/houses and creation of a new Public Square between the town developments surrounding the Zion Chapel (see Calne site 1 in Appendix Three).

2.44 The New Road, High Street, West Hill road corridor is fairly heavily trafficked and tends to impose a strong 'edge' to the town centre, separating it from commercial uses and residential areas to the west. Public transport accessibility is relatively good, with a range of routes serving the town centre with links to surrounding towns and villages and a frequent service on a Chippenham to Swindon route.

2.45 There is a relatively limited range of "other" town centre functions, though there is a relatively new library, a heritage centre/museum/art gallery, council offices, and a large traditional hotel.

2.46 In the absence of standardised property market data, our consultations with local agents indicate that rents in Calne may be around £20 - £22 per sq. ft at present, with a maximum of £25. Yields are around 7% - 8% with a best of 5%. Operator interest is said to be weak. One agent commented that the property offer in Calne is very poor, and yet another commented particularly on the poor quality of the Phelps Parade, suggesting that it is desperate need of improvement, and could, if treated in a similar fashion to the parade at Corsham, have a beneficial effect on the centre.

2.47 The primary and secondary retail frontage areas as defined in the current Local Plan are a fair reflection of the current conditions in the town centre, with the primary frontage area focussed on the Phelps Parade Shopping Centre and the secondary frontage area extending along Wood Street High Street, the Strand, Beach Terrace and Church Street. The two defined areas appear generally to be appropriately drawn in terms of retailer representation, other uses, property market conditions and footfall, but should be reviewed in the light of the issues discussed in Section 5.

## Corsham

2.48 Corsham is the 4th largest town centre in the District, with a total retail floorspace in the town centre of 10,000 sq.m.

2.49 The GOAD data for the town centre shows the following balance of retail uses in the town centre:

**Table 2.7 Corsham Town Centre Floorspace**

| Floorspace | No. of units | (sq.m gross) | % of total f'space |
|---|---|---|---|
| Convenience Goods | 9 | 1450 | 14.50 |
| Comparison Goods | 32 | 4200 | 42.00 |
| Service Uses | 29 | 3710 | 37.10 |
| Vacant and Miscellaneous Uses | 4 | 640 | 6.40 |
| **Total** | **75** | **10000** | **100** |

Source: GOAD

2.50 Corsham town centre can be considered in two areas of very different character - the High Street, which is notable for its extremely attractive Conservation Area buildings of mixed use and specialist shops; and the Martingate Centre which links through to a Somerfield supermarket. There is public car parking adjacent to the supermarket, which provides the car parking for the whole town centre, along with other car parks also accessed from Newlands Road. The southern edge of the centre also includes the Council Offices and Library.

2.51 The town centre therefore provides a useful and attractive mix of functions and quality of environment for a centre of its size, though compared to larger towns it is noticeable that the range of multiple shops (or national names) is limited (see GOAD plan); and that the specialist or independent shops in the Conservation Area, though attractive, are generally "niche" shops (e.g. selling interior design/furnishings, specialist food) and thus perhaps not serving a wide range of local residents. This balance does however help to establish a profile for the town centre and probably draws trade from a wider area than some other centres.

2.52 Corsham is reasonably served by public transport (bus) routes, particularly providing links to Bath and Melksham. The pedestrian environment is generally good.

2.53 Agents report that retail rents are around £18 per sq. ft., though a best figure of £30 per sq. ft was noted. Yields are similar to the other four (smaller) centres in the District, at around 7.5% - 8%, and reasonably static. Operator interest is weak and nearly always for local operators, a requirement of 650 sq ft or larger for leisure use was noted by one agent, though overall agents felt that there is sufficient space for market demand in Corsham. Agents commented on the effect of car parking charges on trade.

2.54 The primary and secondary retail frontage areas as defined in the current Local Plan are a fair reflection of the current conditions in the town centre, with the primary frontage area focussed on the Martingate Centre and the secondary frontage area extending along the High Street and around Post Office Lane, Newlands Road and Pickwick Road. The two defined areas appear to be appropriately drawn in terms of retailer representation, other uses, property market conditions and footfall, but should be reviewed in the light of the considerations discussed in Section 5.

## Malmesbury

2.55 Malmesbury is the 5th town centre in the District, with a total retail floorspace in the town centre of 8,020 sq.m.

2.56 The GOAD data for the town centre shows the following balance of retail uses in the town centre:

**Table 2.8 Malmesbury Town Centre Floorspace**

| Floorspace | No. of units | (sq.m gross) | % of total f'space |
|---|---|---|---|
| Convenience Goods | 7 | 750 | 9.35 |
| Comparison Goods | 40 | 4520 | 56.36 |
| Service Uses | 26 | 2190 | 27.31 |
| Vacant and Miscellaneous Uses | 5 | 560 | 6.98 |
| **Total** | **79** | **8020** | **100** |

Source : GOAD

2.57 Malmesbury is an attractive town centre with a primary retail area along the northern part of the High Street, which links through the Market Cross the Abbey and adjacent river and gardens. The Town centre also includes Cross Hayes which serves as a town centre car park with Council offices, Library and other public facilities.

2.58 The High Street contains a useful mixture of local shops and services along with banks, post office and national names in Boots, Lloyds Pharmacy a small Co-op supermarket. The town centre does serve as a local centre serving the northern part of the District, but as Table 2.8 shows, the representation of convenience retail is limited and the range of other shops indicates a limited role in meeting shoppers' needs.

2.59 Some of the shops are operating from small units and, given the constraints of plot sizes and conservation priorities for the historic environment, it may be appropriate to consider the potential to provide larger or more modern units to meet retailer requirements.

2.60 Car parking for the town centre is provided either at Cross Hayes (100 spaces estimated) or below the Abbey, at some distance from the High Street. This latter parking is also at significantly lower level than the High Street and access to the town centre therefore involves walking up a considerable hill. There is on street parking in the High Street and apparently reasonable turnover of space, allowing shoppers to park outside the shops, however, there was comment at the stakeholders forum about the limited opportunity for shoppers to park free of charge close to shops.

2.61 Public transport (bus) routes serve the town well, with stops adjacent to the shopping area and routes to Chippenham, Cirencester and neighbouring villages, but frequencies are sometimes limited, and average around one bus per hour to the main destinations.

2.62 The quality of environment of the town centre is generally very good, and likely to attract shoppers if the right range and quality of shops were available.

2.63 There is limited vacancy within the town centre, though it was noted that a number of small units were vacant and number more in occupation by charity shops. There is a range of "other" town centre functions, including solicitors, health centre, veterinary surgery, and pubs/restaurants, tourist information office/Citizens Advice Bureau, library, etc. which create an attractive small town centre, but taken along with the relatively small scale of the centre, suggest a limited "critical mass" of retail and other activities to attract sufficient trade.

2.64 Agents confirm this picture, suggesting relatively strong rents (at £25 per sq. ft., or £30 for the best premises), and yields at around the 7% - 8% range (but a best perhaps of 5%) - but weak operator interest and generally poor units to meet current market requirements. Agents commented that road works and the cost of car parking may be having an effect on trade.

2.65 The primary and secondary retail frontage areas as defined in the current Local Plan are a fair reflection of the current conditions in the town centre, with the primary frontage area focussed on High Street and adjacent areas and the secondary frontage area extending along the southern section of High Street and the length of Gloucester Street. The primary frontage area appears generally to be appropriately drawn in terms of retailer representation, other uses, property market conditions and footfall, but may be appropriate for review in the light of relatively strong retailer representation in the area of High Street immediately south of the junction with St. Dennis Road (both sides). The secondary frontage area along Gloucester Road may be appropriate for review due to its apparent limited attractiveness to shoppers and retailers - however it does include a range of premises which can make a useful contribution to the range of commercial premises supporting the town centre.

## Findings of the Survey of Pedestrians

2.66 A survey of pedestrians was undertaken in each of the five main town centres during February and March 2007; the full results of the survey are provided in a separate report from NEMS Market Research. NEMS itself undertook the surveys in Chippenham, Calne, and Wootton Bassett, and Local Authority officers conducted the surveys in Corsham and Malmesbury. A total of 553 pedestrians were surveyed, as set out in Table 2.1 of the NEMS report, with a minimum of 100 respondents in each centre. In this section of our main report, we focus on the main findings, cross-referring to the results summarised in forecasts supplementary volume "Spreadsheets".

### *Mode of Travel*

2.67 There is a significant variation across the five town centres in terms of mode of travel for visitors. In Chippenham, Wootton Basset and Corsham, three-fifths of trips are made by car, whereas in Malmesbury the share for car-trips drops to 51% and in Calne the car share drops even further to 35%. Thus, it is interesting to note that 57% of trips to Calne town centre are by foot, suggesting that it is heavily reliant on its walk-in catchment area. As expected, bus trips are most important in Chippenham, but they account for only 12% of trips to the centre.

### *Frequency of Visits*

2.68 The smaller centres have more frequent visitors, reflecting their role as convenience centres, with limited drawing power beyond their localised catchment areas. Conversely, three-fifths of the visitors to Chippenham have frequencies of visits that are less than once per week.

### *Main Reason for Visit*

2.69 The main reasons for visiting the smaller centres are to buy food and groceries and for services, only in Chippenham is the main reason to buy non-food goods. However, Chippenham also has an important role in providing for services.

### *What Visitors Like Most about the Town Centres*

2.70 In Chippenham, respondents found it hard to identify what they liked most, but the most frequently cited responses were its proximity and its selection and choice of independent shops. There was also noticeable support for the pedestrianised part of the centre, but only 8% of respondents identified the selection and choice of the town's non-food multiples as their top 'like'.

2.71 In Calne, visitors liked its proximity, the ease of parking, the cheapness of parking, and the fact that the centre is not too crowded. A significant proportion of respondents also cited the town centre's overall character and atmosphere, the quality of its supermarkets, the selections and choice of independent shops and the centre's historic buildings.

2.72 In Wootton Bassett, the most frequently mentioned 'likes' were the selection/choice of non-food multiples and the town's friendly atmosphere. About a tenth of the respondents also cited the town centre's character and its historic buildings.

2.73 Malmesbury town centre clearly has significant strengths, with 51% of respondents citing its character/atmosphere and with a third highlighting the selection and choice of its independent specialist shops and the town centre's historic buildings. There was also a significant proportion of respondents who identified the quality of the shops in general and the selection and choice of non-food multiples.

2.74 In Corsham, the convenience of the centre was the most frequently cited 'like most' factor. However, 36% identified the selection and choice of independent shops as their most important 'like', 25% cited the town centre's character and atmosphere, 11% liked the range of services and 9% liked all of the shops on the high street.

### *What Visitors Dislike Most about the Town Centres*

2.75 In Chippenham, the most frequently cited dislike is the lack of choice of high street multiples, followed by the lack of choice of independent specialist shops. This is somewhat surprising given that the choice of independent specialists also ranked highly in terms of the frequency of 'like most' factors. The other principal 'dislike' in Chippenham is the perceived difficulty in parking.

2.76 In Calne, criticisms focused on perceptions of dirty shopping streets, the presence of threatening individuals and groups and the lack of sufficient police presence and security measures.

2.77 In Wootton Bassett and Malmesbury, the most frequently cited 'dislikes' are perceived difficulties in parking, and road congestion. Parking is also perceived to be a difficulty in Corsham, closely followed by the lack of choice of high street multiples. 10% of visitors in Corsham cited the lack of a larger supermarket.

### *Suggested Improvements for Centres*

2.78 In Chippenham, there is a general perception of a need for a better choice of shops, and a need for more high street multiples, particularly quality multiples, such as Marks & Spencer. Some respondents also called for more clothes shops and fewer mobile phone shops.

2.79 In Calne, the suggestions for improvements reflected the dislikes so that the most frequently cited responses were to improve the appearance and environment of the centre and to improve security measures, such as CCTV. A significant proportion of respondents also cited the need for better removal of litter and better leisure facilities.

2.80 In Wootton Bassett, a surprisingly small proportion of respondents were able to provide suggestions for improvements and those who were able to comment focused on the need for more free parking.

2.81 In Malmesbury, suggestions again focused on parking; visitors want more parking in general, cheaper parking and more accessible parking. 10% of respondents also cited the need for more priority to be given to pedestrians.

2.82 In Corsham, the need for more parking was yet again the most frequently cited suggestion for improvement, followed by a better choice of shops in general, a bigger supermarket, more high street multiples and a better quality of shops. There are also calls for improvements to appearance of the centre and more frequent litter removal.

### *Leisure Facilities*

2.83 It is noteworthy that 54% of the visitors to Calne suggested that the centre was lacking in leisure facilities, which is a significantly higher proportion than in the other town centres. The highest satisfaction, in respect of leisure, is in Chippenham where only 27% considered the centre to be lacking in facilities. When asked which types of leisure facilities each centre was lacking in, the highest proportions were as set out in Table 2.9. Visitors to Calne clearly feel most strongly about the need for a leisure centre or cinema.

**Table 2.9 Leisure Facilities Most Frequently Cited as Being Lacking**

| Centre | Leisure Facility Most Frequently Cited as Being Lacking | Percentage of Respondents |
|---|---|---|
| Chippenham | Leisure centre | 25% |
| | Cinema | 23% |
| Calne | Leisure centre | 62% |
| | Cinema | 49% |
| Wootton Bassett | Keep leisure centre open | 40% |
| | More for young people | 26% |
| Malmesbury | Restaurants, cafés | 36% |
| | Pubs, bars | 20% |
| Corsham | Restaurants, cafés | 57% |
| | Pubs, bars | 20% |