



Report

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Wiltshire Council Town Centre and Retail Study

Final Report

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For and on behalf of GVA Ltd

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1. Introduction

- 1.1 GVA was instructed by Wiltshire Council in April 2010 to carry out the Wiltshire Town Centre and Retail Study to inform the emerging Wiltshire Core Strategy in accordance with guidance set out in Planning Policy Statement 4 (PPS4): Planning for Sustainable Economic Growth (December 2009), the accompanying Practice Guidance, Planning Policy Statement 12 (Local Spatial Planning) and other relevant planning documents.
- 1.2 Wiltshire Council was formed on 1st April 2009 following a process of local government re-organisation when the former District Councils of Kennet, North Wiltshire, Salisbury, West Wiltshire and Wiltshire County Council were amalgamated to form a new authority.
- 1.1 This study will update previous retail studies undertaken for the former District Councils and provide a robust and sound evidence base to inform the Council's Local Development Framework (LDF) and future Development Plan Documents (DPD). It is also a tool for the Council to make informed choices about the nature and extent of growth to be accommodated in the future. In particular, the study will update the evidence base supporting the Core Strategy Pre-Submission Draft and provide advice on the appropriate role and function of Wiltshire's largest towns, namely Salisbury, Trowbridge and Chippenham.
- 1.3 Based on our research, analysis and overall findings, the study identifies the performance of the Wiltshire's main town centres and the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace up to 2026, as well as providing advice on retail and leisure planning matters.

Scope

- 1.4 The aim of the study, as set out in the Council's Brief is to deliver a robust Town Centre and Retail Study for the whole of Wiltshire, capable of withstanding scrutiny at an Examination in Public, and which is fully compliant with the appropriate planning guidance. In particular, the study is required to provide an appropriate strategy for

Wiltshire, which takes a holistic approach and fully considers the distinctiveness of its towns and identifies a suitable role for each settlement.

- 1.5 The study is required to focus on the three main towns, namely Salisbury, Chippenham and Trowbridge, as well as the following market towns; Amesbury, Bradford-on-Avon, Calne, Corsham, Cricklade, Downton, Devizes, Malmesbury, Marlborough, Melksham, Mere, Pewsey, Tidworth and Ludgershall, Tisbury, Warminster, Westbury, Wilton and Wootton Bassett. It is necessary for the study to consider the interrelationships between the settlements, as well as taking account of retail destinations outside of the authority's boundaries, such as Bath, Bristol, Swindon and Southampton.

We have undertaken a thorough audit of the current status of retail activities in Wiltshire and provide detailed information on the likely future demand for retail and leisure floorspace up to 2026. Our capacity assessment specifically provides an estimate of the scale and nature of any changes in the future retail provision in the light of:-

- Existing and forecast population levels;
- Housing and regeneration growth;
- Forecast changes in retail expenditure;
- Forecast improvements in the productivity and efficiency of retail floorspace;
- Changing forms of retail provision; and
- Possible increases or decreases in the trade draw from competing centres.

Approach

- 1.6 Our approach draws on the recommendations of the Practice Guidance on Need, Impact and the Sequential Approach published by the Department of Communities and Local Government (DCLG) alongside PPS4 in December 2009. We have adopted a transparent approach, where the key steps of our analysis, data inputs and assumptions are clearly set out and justified. In accordance with the Practice Guidance, our approach is underpinned by the use of a household telephone survey to help establish current shopping patterns, town centre catchments and market share estimates for both comparison and convenience goods retailing.
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- 1.7 This study also comprises a thorough overview of the existing retail network and retail hierarchy in Wiltshire including a detailed audit and qualitative healthcheck of Wiltshire's three Major Centres, drawing where possible on the key performance indicators set out in Annex D of PPS4. We also review commercial leisure provision and provide an indication of future levels of leisure expenditure. We provide advice on broad locations for new retail development including identifying areas of opportunity for expansion and assessing the physical capacity of centres to accommodate growth.
- 1.8 The study brief does not require an assessment of specific sites in each centre to accommodate any identified need.

Report Structure

- 1.9 This report draws together the results of our research, incorporating the findings of the detailed survey-based technical analysis, healthcheck assessments and advice on appropriate frontage policies for the centres. The report is structured as follows:-
- **Section 2** summarises the national, regional and local policy framework including the current retail hierarchy definitions, relevant to retail planning in Wiltshire.
 - **Section 3** considers current retail trends and specifically the key socio-economic trends which are likely to influence the evolution of retailing in Wiltshire.
 - **Section 4** reviews the sub regional context and in particular the influence of competing centres in the wider sub region, and potential changes in influence in the future.
 - **Section 5** presents our qualitative assessment of the role, attraction and performance of Wiltshire key town centres.
 - **Section 6** sets out our baseline capacity projections for convenience and comparison goods in Wiltshire, focusing in particular on the capacity for further retail floorspace, with regard to identified commitments.
 - **Section 7** provides a qualitative review of the distribution of commercial leisure facilities, as well as estimates of future leisure expenditure; and
 - **Sections 8 and 9** set out our conclusions and recommendations on the need and opportunities for future growth in Wiltshire's centres.

2. Policy Framework

National Policy Context

PPS4: Planning for Sustainable Economic Growth, December 2009

- 2.1 PPS4 was published on 29th December 2009 and replaces PPG 4, PPG5, PPS6, and parts of PPS7 and PPG13. The document is accompanied by a Practice Guidance, which was prepared by GVA on behalf of the Department of Communities and Local Government. The new streamlined policy statement brings the Government's town centre policies into line with its wider policies for economic development set within a clear overarching policy to promote sustainable economic growth.
- 2.2 The main change in PPS4 is the abolition of the needs test at the application stage. The sequential approach remains largely unaltered and the onus still rests on the applicant to demonstrate 'flexibility' when considering whether these proposals can be accommodated in a town centre. A 'new' impact test is introduced. Also, of note is that PPS4 suggests that local planning authorities should tailor aspects of the policy to local circumstances. PPS4 in effect sets a default position on key impact tests, the thresholds for the preparation of impact assessments, and maximum parking standards (consistent with PPG13), but delegates to individual Local Planning Authorities (LPAs) the role of setting different thresholds and standards, and applying local impact criteria.
- 2.3 The central message of the guidance is the need for a more proactive approach to securing new investment in centres, and achieving more sustainable patterns of development. The Government's key objective for town centres is to promote their vitality and viability by:
- Focussing new economic growth and development of main town centre uses in existing centres and remedying deficiencies in provision in areas with poor access to facilities; and
 - Allowing competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local

services in town centres which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups).

- 2.4 The statement advises that LPAs should plan positively for growth and development by assessing the need for further main town centre uses and ensure there is capacity to accommodate them, taking account of the role of centres in the hierarchy; and to identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs. In assessing need for retail and leisure development LPAs should take account of both quantitative and qualitative need, giving additional weight to the latter in deprived areas.
- 2.5 In assessing quantitative need for retail and leisure development LPAs should have regard to relevant market information and economic data, including a realistic assessment of population and future growth, forecast expenditure and forecast improvements in retail sales density. In assessing qualitative need LPAs should assess whether provision and distribution of shopping, leisure and local services allows genuine choice to meet the needs of the whole community (particularly those in deprived areas), in light of the objective to promote vitality and viability of town centres and the application of the sequential approach. LPAs should also take into account the degree to which shops may be overtrading and whether there is need to increase competition and retail mix.
- 2.6 PPS4 states that, in planning for centres, regional and local planning authorities should set out a strategy for the management and growth of centres over the plan period, setting flexible policies allowing centres to respond to changing economic circumstances. LPAs should define the network and hierarchy of centres that is resilient to anticipated future economic changes to meet the needs of their catchments. Choices should be made about which centres will accommodate any identified need for growth in town centre uses, considering their expansion where necessary and the need to avoid an over concentration of growth in centres.
- 2.7 Identified deficiencies in the network of centres should also be addressed, giving consideration to the appropriateness of designating new centres; reclassifying existing centres; planning for extensions; or scope for consolidation. The need for any new, expanded or redeveloped out-of-centre regional or sub-regional shopping centre, or any significant change in the role or function of centres should be considered at the regional level.
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- 2.8 In addition to defining the extent of the primary shopping area for their centres, LPAs are encouraged to distinguish between primary and secondary frontages (Annex B). Having regard to the need to encourage diversification of uses in town centres as a whole, PPS4 states that primary frontages should contain a high proportion of retail uses, while secondary frontages provide greater opportunities for a diversity of uses. Where frontages are identified, the appropriate local development documents should include policies that make clear which uses will be permitted in such locations.
- 2.9 PPS4 encourages LPAs to proactively plan to promote competitive town centre environments and provide consumer choice by:
- supporting a diverse range of uses (including complementary evening and night-time uses) which appeal to a wide range of age and social groups;
 - planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of the area;
 - supporting shops, services and other important small scale economic uses in local centres and villages;
 - identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified;
 - retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement; and
 - taking measures to conserve, where appropriate, and enhance the established character and diversity of their town centres.
- 2.10 LPAs should identify an appropriate range of sites to accommodate at least the first five years identified need. Sites for main town centre uses should be identified through a sequential approach to site selection giving preference to locations in appropriate existing centres in the first instance, followed by edge-of-centre locations and out-of-centre sites, with preference given to those that are more accessible or have a higher likelihood of forming links with an existing centre.
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- 2.11 The impact of proposed locations for development on existing centres will also need to be assessed by the LPA, taking into account impact considerations set out in **Policy EC16** which include impact on town centre vitality and viability; in-centre trade/turnover; investment in centres; delivery of development on allocated sites; and any locally important impacts on centres identified by the LPA.
- 2.12 In the determination of planning applications for main town centre uses that are not in a centre and not in accordance with an up to date development plan, PPS4 requires applicants to demonstrate compliance with the sequential approach and impact assessment taking into account the impact considerations set out in **Policy EC16**. Assessments of impact should focus on the first five years after the implementation of a proposal and should be proportionate to the scale, nature and detail of the proposed development.
- 2.13 **Policy EC17.1** directs LPAs to refuse planning permission where an applicant fails to demonstrate compliance with the sequential approach or the proposal is likely to lead to a significant impact. Judgements about the extent and significance of any impacts should be informed by the development plan (where this is up to date) or recent local assessments of the health of town centres and any other published local information e.g. a town centre or retail strategy.

Local Policy Context

- 2.14 Local Plans produced by the former district councils were inherited by Wiltshire Council in April 2009. The Local Plans will continue to form part of the development plan for Wiltshire until replaced by new Development Plan Documents (DPDs), including the Core Strategy, which is due to be adopted in 2011.

Salisbury District Local Plan June 2003

- 2.15 The Salisbury District Local Plan was adopted in June 2003 and provides detailed policies to guide day to day planning decisions in the District for the period up to 2011. In 2007 key policies were saved from the Local Plan and are summarised below.
- 2.16 The Local Plan identifies Salisbury as the principal shopping area within the District. Amesbury is recognised as the second largest settlement in the District and functions as a District Centre. There are also four other centres in the District that perform a
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local role in the provision of shopping these include Wilton, Tisbury, Downton and Mere and have more limited catchments than the two main centres.

2.17 The Local Plan sets out a strategy for shopping which includes:

- i) protecting and maintaining the historic character and role of Salisbury as a sub regional centre;
- ii) to restrict new development which is appropriate for the role and character of the city;
- iii) to accommodate where possible new trends in retailing and to locate development within or adjacent to centres consistent with the sequential approach;
- iv) to promote central area development of a scale and design compatible with the historic character of the city centre;
- v) To exploit the opportunities remaining in city and town centres for new shops and conversion of historic buildings to retail use;
- vi) To link shopping proposals with those for pedestrianisation, traffic management and car parking;
- vii) To maintain access to the city centre by a choice of means of transport;
- viii) To maintain the city centre's vitality by retaining a wide range of goods available.

2.18 The Local Plan identifies Primary and Secondary Shopping frontages in both Salisbury and Amesbury. The Council supports the maintenance of a predominantly retail element within these areas but recognises that different but complimentary uses during the day and in the evening can reinforce each other. The general aim is to preserve 60% of each section of primary frontage. **Policy S1** deals with the change of use of ground floor shop premises to non-shopping uses sets out a list of criteria which each application will be assessed on. These criteria include; the units location and prominence; the size and frontage width of the premises; the number, distribution and proximity of the existing ground floor premises with non-shopping uses; the nature and

character of the proposed use; the potential adverse impact on nearby residents; and the maintenance of a window display at all times.

- 2.19 In relation to the Secondary Frontages in Salisbury and Amesbury, the Council also seek to ensure that retailing activity remains the dominant land use at ground floor. **Policy S2** sets out a less stringent list of criteria in relation to change of use applications, so that the retail function of the area is not undermined and that there are no adverse impacts such as increased on-street parking or the loss of a residential unit.
- 2.20 The Local Plan recognises that the provision of shopping facilities is of particular importance within predominantly rural areas of the district. It considers that the retention of village shops is particularly important to the well being of the local community and will therefore seek to resist their change of use. Proposals for small scale shops or change of use of existing buildings will be considered against the criteria in **Policy S9**. The policy hopes to ensure that there is no adverse impact on nearby residences; there is no physical or visual harm to the character of the area; and access, services and local road network is satisfactory.
- 2.21 The Local Plan identifies two development sites in Salisbury city centre the Brown Street car park and The Maltings. **Policy S5** covers the Brown Street car park and states that the most appropriate use would be a mix of development which should incorporate a retail element, subject to the implementation of the park and ride. The Maltings, which is covered by **Policy S6**, is expected to involve the redevelopment and enlargement of the existing foodstore. In relation to Amesbury town centre, the only site designated for development is the Redworth House site which is allocated for a new foodstore. This site has since been developed for a new Co-op store.

Kennet

- 2.22 The Kennet Local Plan was adopted in June 2004 and is the current local plan for the east Wiltshire area. In 2007 key policies were saved from the Local Plan and are summarised below. The Local Plan identifies the role of the district centres. Devizes, Marlborough and Tidworth are identified as the three Main Towns which provide the main local services and facilities. Pewsey, Market Lavington and Ludgershall are identified as Larger Villages which provide a secondary service role. All other

settlements are grouped under the category of Other Villages and Rural areas which have a much smaller service role.

- 2.23 The shopping policies in the Local Plan aim to improve the retail base of the market towns. The principle objectives for the policies in town centres are to sustain and enhance the vitality and viability of existing town and service centres and to ensure new shops, services and facilities are located where people have easy access by a choice of means of transport.
- 2.24 The Local Plan promotes town centre development within Devizes and Marlborough. **Policy ED17** states that new retail development should be located within town centres. Developments will only be permitted in out of centre locations if all potential town centre sites have been assessed and no appropriate sites are available and if the proposal will not seriously affect the vitality and viability of the town centre.
- 2.25 In relation to prime shopping areas, as defined for Devizes and Marlborough, **Policy ED18** seeks to ensure that retail uses are dominant on the ground floor, and concentrated in primary shopping areas. The policy states that planning permission shall not be granted for change of use of ground floor premises other than Class A1 retail unless the development would add to the vitality and viability of the centre, secure the future of a Listed Building or if the development would make a positive contribution to the character of the Conservation Area. Supporting ground floor retail in prime shopping areas will help the town centres to function primarily as retail areas. Secondary shopping areas in Devizes and Marlborough have less rigorous criteria for determining change of use of premises from A1. **Policy ED19** states that change of use will be permitted where development will not create major breaks in the existing commercial frontage, will introduce activities likely to enhance the vitality and viability of the centre or will integrate with the historic fabric of the town.
- 2.26 Devizes town centre is identified as a location for retail floorspace growth over the Plan period to ensure maintaining the town's position in the retail hierarchy. In order to secure retail development in Devizes town centre, **Policy ED20** encourages proposals to provide retail units which;
- meet the requirements of modern retailers;

- concentrate on the need to provide units suitable for comparison rather than convenience retailers; and
 - significantly improve the type and range of retail opportunities in the town.
- 2.27 New development within the service centres of Pewsey, Market Lavington, Tidworth and Ludgershall are outlined in **Policy ED24**. Planning permission for new shops, services and extensions in service centres will be granted provided there are adequate service arrangements. In Ludgershall, units on Andover Road should ensure that there is sufficient pedestrian access to off-street parking. **Policy ED28** states that shopping facilities in rural areas shall be enhanced only if the use is to cater to local needs.
- 2.28 The Local Plan identifies several development sites in Devizes town centre. **Policy ED21** states that a key development area for Devizes is North Gate where significant additional floorspace can be provided at the western end of the Market Place. There is no specific allocation of land for retail development in Marlborough, the most suitable developments in this area will be small scale.

North Wiltshire

- 2.29 The North Wiltshire Local Plan was adopted in June 2006 and is the current development plan for the north Wiltshire area. In 2007 key policies were saved from the Local Plan and are summarised below.
- 2.30 Chippenham, Malmesbury and Calne are defined as market towns and Corsham, Wootton Bassett and Cricklade are identified as towns. The six towns provide the main retail and service provision in the district. Chippenham is identified as a major retailing centre within the district area. Cricklade is the smallest of the town centres and serves day to day functions.
- 2.31 Primary frontage areas in the six towns are subject to **Policy R1** which controls the development of shops, financial and professional services and food and drink establishments. Secondary frontage areas in the towns are subject to **Policy R2** which controls the development of shops, financial and professional services, food premises, leisure facilities and nightclubs. Permission will be granted in primary and secondary areas provided that; the proposal will not undermine the vitality and viability of the

town centre; the proposal is consistent with the scale and function of the town centre; no more than 5% of uses in the primary shopping area are non A1 uses; and that access is provided to upper floors which could be used for residential uses.

2.32 Local Plan **Policy R4** states that proposals outside of town centre designated shopping areas will only be permitted where;

- There is a demonstrable need for the development;
- The sequential approach has been followed and no suitable sites located in the town centre;
- Proposals do not individually or cumulatively undermine the vitality or viability of existing centres; and
- The proposal is accessible by walking, cycling and public transport.

2.33 The Local Plan seeks to encourage residential uses on upper floors, with retail units below in town centres. **Policy R7** states that residential uses should be promoted as long as the retail function of the unit is not jeopardised. This policy aims to enhance the vitality and viability of town centres by increasing activity.

2.34 A retail development opportunity has been identified in Chippenham town centre. **Policy R3** states that the Bath Road car park in Chippenham would be a suitable location for A1, A2 and A3 uses as a natural extension to the town centre.

West Wiltshire

2.35 The latest West Wiltshire Local Plan is the 1st Alteration document, adopted in June 2004. This document is the current Local Plan for the west Wiltshire district. In 2007 key policies were saved from the Local Plan and are summarised below.

2.36 There are five main towns identified in the Local Plan; Trowbridge, Melksham, Westbury, Bradford-on-Avon and Warminster. The Local Plan sets out main aims for town centres and shopping:

- To sustain and enhance the vitality and viability of the five town centres in the District;

- To encourage new retail, leisure and mixed use development within or if necessary adjacent to the five town centres;
- To improve the environment of the five town centres; and
- To ensure that there is provision for local shopping wherever possible.

2.37 Town centre shopping is encouraged to concentrate in primary retail frontage areas through **Policy SP1**. Retail development within town centre commercial areas will be permitted within areas of primary retail frontage if the development sustains the range or quality of shopping provision, is in keeping with the range scale and character of the centre, is easily accessible by foot, cycle or public transport and has adequate car parking provision.

2.38 Out of centre shopping developments and extensions will only be permitted if all of the following criteria are met:

- There is the need for development;
- There are no suitable and viable sites available within firstly, the defined Primary Retail Frontages and secondly, (for out of centre proposals) edge of centre locations;
- The development does not harm the vitality or viability of nearby centres;
- The development is of acceptable scale, materials and design and does not harm the local environment or residential amenity;
- The development is sited to reduce the number and length of car journeys and is accessible by a choice of means of transport, including by foot, bicycle and public transport; and
- The traffic generated by the proposal can be accommodated safely on the local highway network and sufficient car parking and servicing is provided.

2.39 The Local Plan identifies primary and secondary retail frontages. In primary retail frontage locations (as indicated on the proposals map) shopping is the primary land use and will be protected. **Policy SP4** states that changes of use from A1 to A2 and A3 uses at ground floor level will only be permitted that have regard to the existing

mix of uses, where they do not prejudice the shopping function of the primary retail frontages or harm the vitality of the town centre. All proposals will be expected to provide a window display and a public counter service. **Policy SP5** states that in the secondary retail frontage areas, changes of use from Class A1, to A2 or A3 uses will be permitted. Other changes of use will be permitted subject to the primary commercial function of the centres being maintained. It is also stated that vacant retail units may be particularly suitable for conversion to flats.

- 2.40 Leisure and entertainment uses are identified in the Local Plan as ways to improve the vitality and viability of town centres outside of normal shopping hours. Policy LE1 states that proposals for leisure and entertainment facilities such as cinemas, bowling alleys and nightclubs, will be directed to locations within the primary retail frontage.
- 2.41 A retail development site has been identified in Trowbridge in **Policy SP2**. Land at Court Street and Castle Street is allocated for further town centre retail provision. The site has been chosen for retail development to extend the range of shopping available in 'the Shires'. **Policy LE2** identifies a further site for redevelopment which should include retail uses. The site is located at the former Tesco unit, St Stephens Place, Trowbridge. Alternative uses for the site could include commercial leisure provision or arts/civic uses.

Wiltshire Core Strategy (including South Wiltshire Core Strategy)

- 2.42 Work is underway to prepare a range of Development Plan documents (DPDs) for a single Wiltshire Local Development Framework (LDF). The LDF will replace the District's Plan for the former District Councils and components of the Wiltshire and Swindon Structure Plan 2016. The LDF will provide the planning policies for Wiltshire Council over the next 20 years.
- 2.43 Prior to the formation of Wiltshire Council, each District Council had progressed with individual Core Strategies. Work on the four individual District Core Strategies is to be merged into one Core Strategy for the whole of Wiltshire. Work on the South Wiltshire Core Strategy was already well advanced when Wiltshire Council was formed. As a result, work on the South Wiltshire Core Strategy was continued to enable new housing and employment sites to be identified before the Wiltshire Core Strategy is in place and is therefore a transitional document. The South Wiltshire Core Strategy Examination in Public is now in suspension awaiting the publication of the draft

Localism Bill and to enable the council to review housing and employment figures. The Wiltshire Core Strategy will set out the Council's spatial vision, key objectives and overall principles for development in the County. The Proposed Submission Draft should be published for consultation during 2011.

Previous Retail Studies

- 2.44 This section summarises the findings of the historical retail studies that were commissioned by the former West Wiltshire, North Wiltshire and Salisbury District Council's to inform their Core Strategy work. Please note there was not a relevant retail study covering the former Kennet District Council area.

West Wiltshire Retail Needs Study, April 2007 (Prepared on behalf of West Wiltshire District Council by DPDS Consulting)

- 2.45 The study uses the results of a telephone survey to assess shopping patterns and forecast capacity at 2012 and 2017 for retail floorspace in five town centres, namely Bradford on Avon, Melksham, Trowbridge, Warminster and Westbury.
- 2.46 The five town centres are compared having regard to a range of factors including number of retail units, national multiples, and pedestrian count data. Trowbridge has the most town centre units, the most food and non-food stores, the most retail services and, by some distance, the highest turnover. On most aspects, Warminster is second in the hierarchy, although the highest pedestrian counts were recorded in Warminster town centre. Melksham is third in the hierarchy in respect of each of the criteria. Westbury and Bradford on Avon are lower in the hierarchy and although they are of a similar size they have very different roles and functions, with Westbury predominantly serving local needs and Bradford on Avon combining its function as a local service centre with its role as a tourist destination.
- 2.47 Towns and cities in the sub-regional hierarchy which are outside West Wiltshire District influence shopping patterns within the District with Bath, Salisbury, Frome and Devizes having the most significant influence on comparison goods shopping patterns. The combined influence of Bristol, Swindon and Chippenham is also notable.
- 2.48 In terms of convenience goods, the study forecasts very moderate levels of expenditure capacity up to 2012 in Warminster, Melksham, and Bradford on Avon.
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Based on current forecasts, there will be no surplus expenditure capacity in Trowbridge or Westbury for the next ten years. However, it is noted that the study assumes constant market shares but concludes it is possible that improvements to the range and choice of shopping provision in a town will attract more shoppers and increase market share. The capacity forecasts for convenience goods are set out in the table below.

Table 2.1 Convenience Goods Capacity Projections (sqm net)

(sqm net)	2012	2017
Trowbridge	0	68 - 135
Warminster	153 - 306	452 - 903
Melksham	237 - 473	533 - 1,067
Westbury	0	82 - 164
Bradford	260 - 521	371 - 743

2.49 The choice of stores in Bradford on Avon and Westbury is comparatively poor and is reflected in the amount of expenditure which 'leaks' to stores in other towns. The study states that it is likely that additional convenience goods floorspace in Bradford on Avon and Westbury would result in greater levels of expenditure retention and bring about qualitative improvements in the shopping offer.

2.50 For comparison goods, there is expenditure capacity to support additional floorspace in all five town centres, based on current market shares. The study also states that there is considerable scope to improve existing levels of expenditure retention in each centre. If new shopping facilities are not provided, it is likely that levels of expenditure leakage will increase as a result of pipeline developments in competing centres. The capacity forecasts for comparison goods are set out in the table below.

Table 2.2: Comparison Goods Capacity Projections (sqm net)

(sqm net)	2012	2017
Trowbridge	6,033	18,263
Warminster	1,533	3,622
Melksham	1,087	2,654
Westbury	685	1,784
Bradford	158	355

North Wiltshire Retail Needs Assessment Study, September 2007 (Prepared on behalf of North Wiltshire District Council by Roger Tym and Partners)

- 2.51 This study forecasts capacity for retail floorspace up to 2026, specifically focussing on the five town centres of Chippenham, Calne, Corsham, Malmesbury and Wootton Bassett and is based on the results of a telephone survey.
- 2.52 Approximately 37% of the expenditure on comparison goods of residents of the North Wiltshire study area is retained and spent in town, district and local centres, and in freestanding stores which are located in the study area. 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.
- 2.53 For convenience goods, the study reports that most convenience shopping is undertaken on a highly localised basis. However, there is some localised leakage in particular around Cricklade where residents travel to Cirencester and Swindon; residents in Wootton Bassett who travel to Swindon and residents in Malmesbury who travel to Tetbury and Cirencester.
- 2.54 For comparison goods, assuming a constant market share, the study forecasts a need for approximately 15,800 sqm gross up to 2016; rising about 45,800 sqm gross by 2026. For convenience goods, assuming a constant market share, there is a need for

between 2,100 and 3,100 sqm gross up to 2016; and between 5,700 and 7,800 sqm gross by 2026. These figures indicate the quantitative retail need for the whole of the North Wiltshire catchment area.

- 2.55 The study recommends supporting and enhancing the role of Chippenham as the largest centre in the District, particularly given the competition in adjacent districts and the polarisation of larger centres. It also states that the existing roles of the smaller centres should be supported.

*Salisbury District Council Retail Study Retail and Leisure Needs Study, October 2006
(Prepared by GVA)*

- 2.56 GVA was instructed in June 2006 by Salisbury District Council to undertake a Retail and Leisure Needs Assessment for Salisbury District Council. The methodology incorporates a comprehensive up-to-date review of retailing and leisure needs in the District with particular emphasis on the centres of Salisbury, Amesbury and the smaller centres of Wilton, Tisbury, Mere and Downton.
- 2.57 The study identifies Southampton, Bath, Trowbridge, Swindon, Yeovil, Andover, Poole and Bournemouth as the key competing centres. Salisbury appears to sit between the stronger and weaker centres in the sub-region, which could be a vulnerable position over the LDF period, particularly as competing centres continue to implement major improvements to their town centres.
- 2.58 The quantitative analysis indicates residual capacity to support additional retail floorspace over the forthcoming LDF period as set out in the tables below.

Table 2.3: Convenience Goods Baseline Capacity Projections (sqm net)

(sqm net)	2011	2016	2021
District Wide	1,516	2,623	3,790
Salisbury City Centre	262	1,178	2,145
Amesbury Town Centre	-131	-29	78

Table 2.4: Comparison Goods Baseline Capacity Projections (sqm net)

(sqm net)	2011	2016	2021
District Wide	9,181	22,488	38,115
Salisbury City Centre	5,031	13,346	22,970
Amesbury Town Centre	117	253	408

- 2.59 The study concludes that in a 'do-nothing' scenario Salisbury will fall further behind the larger stronger centres, and it is crucial for Salisbury to encourage investment and new retailers. It will be equally as crucial for Salisbury not to focus solely on new format retail development, and any town centre development should happen in conjunction with protecting and enhancing the historic environment, tourist economy and differential/specialist retail offer. The Maltings and Central Car Park site is identified as crucial to the vitality and viability of the City Centre and its continued success as a retail, entertainment, employment, tourist and residential centre.
- 2.60 The overall objective over the LDF period should be to enhance city centre foodstore provision, enhance the evening economy, introduce space for higher order and quality retailer, maintain the range of independent and specialist retailers, protect the city's identity and embrace the historic fabric and built environment, and ensure that any new development is of an appropriate scale and design to complement the existing city centre.
- 2.61 Amesbury is identified as a relatively healthy centre, which has experienced substantial investment in recent years including a replacement Co-Op. The study recommends that the Council should continue to enhance the centre and support the role of the new Co-Op. Downton, Mere, Tisbury and Wilton are all identified as performing well as local centres and do not appear vulnerable to decline. The study recommends that policy should ensure the network of local centres provides easily accessible shopping to meet people's day to day needs and should be the focus for investment in more accessible local services.

Non Statutory Documents

2.62 There are also a number of non statutory planning documents which have been produced by various partnerships for the centres of Salisbury, Chippenham and Warminster. This section summarises the findings of these vision documents. There are currently no vision or Masterplan documents for Trowbridge or Devizes. Trowbridge Vision was developed in 2001 and a Masterplan was commissioned, however the partnership was renamed Transforming Trowbridge in 2005 to reflect the change in focus from planning to delivery and a vision or Masterplan document has not yet been completed.

The Salisbury Vision, 2008 (Prepared on behalf of Salisbury District Council, South West Regional Development Agency and Wiltshire County Council)

2.63 The Salisbury Vision is a regeneration plan, which sets out a long term development programme to bring about change and improvements to the city centre. The Vision is for 'Salisbury to be a clean, green, safe and friendly city; a place that is consistently acknowledged as being one of England's best places to live'. The document sets out initial proposals, aimed to deliver the overall strategies of Development, Transport and Movement and the Public Realm. There are 24 specific 'Vision Projects' which are potential regeneration projects which provide detail about how the improvements will be delivered. The key retail Vision Projects in Salisbury include The Maltings and Central Car Park site and The Market Place, which will be discussed in further detail below.

Chippenham Vision Strategy Document, 2008 (Prepared on behalf of Chamber of Commerce and Community Area Partnership)

2.64 The Chippenham Vision document analyses the current position of the town centre drawing on information from various evidence sources, such as town centre health checks, in order to identify the potential that Chippenham has to offer. The document outlines opportunities and ambitions for the town, to enable Chippenham to be 'a great place to live, work and visit'. The Chippenham Vision identifies priority actions, which address key issues such as retail, shopping and food and leisure and tourism. Key priority actions are discussed in more depth in the health check section. The document does not provide detailed delivery guidelines, and acts to purely convey the vision of the partnership team.

Draft Warminster Town Plan, December 2009 (Prepared on behalf of Warminster Town Council by Urban Practitioners)

- 2.65 Currently in draft form, the Warminster Town Plan is being developed to be adopted as a Supplementary Planning Document (SPD) as part of the new LDF for Wiltshire. The document has been produced by Warminster Town Council alongside Wiltshire Council and the input of community groups. The Town Plan identifies six objectives, including creating a sustainable shopping centre and a tourist destination. The objectives are developed into an overarching strategy and policies for the town. Policies include directing new retail development to the central core of the town centre and also supporting new evening, leisure and community facilities in the town centre.

3. Retail and Leisure Trends

3.1 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing in Wiltshire. This section examines key trends and drivers for change in the retail industry. We outline the key national trends in retailing and service provision of particular relevance to Wiltshire's Strategically Significant Cities and Towns, namely Chippenham, Salisbury and Trowbridge drawing on a range of published data sources, including research by Verdict Analysis, Mintel, Experian, the New Economics Foundation and the Office of National Statistics (ONS).

Demographics

3.2 Over the last 15 years the UK population has increased by 3.9 million to 61.8 million, which is a rate of approximately 0.44% per annum amounting to a total increase of 6.7% over 15 years. The number of households has also increased over the same period and at a greater rate (11.5% over 15 years). The average household size has however decreased from 2.46 people per household in 1994 to 2.36 people per household in 2009, as decreasing family sizes and instances of divorce are becoming more common.¹

3.3 The population is forecast to continue growing. The total fertility rate (TFR) in the UK has risen each year since 2001 and was last recorded in 2008 at 1.96 children per woman, its highest level since 1973. Although the current TFR rate has not reached the natural population replacement level of 2.1 children per woman, other factors such as increased life expectancy and immigration combine to boost projected population numbers.² These trends are forecast to continue and will affect spending habits, how much we spend, on what and where.

¹Office of National Statistics, 2009. Figures have been interpolated between 1991 and 2001 to account for 2001 Census data

²Office of National Statistics, 2009.

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- 3.4 Over the next 20 years the 65 and over age group is expected to grow by 42.9% and the under 65s age group by only 6.4%.³ Older shoppers have a younger mindset than in the past, they are more fashion aware and, in recent years, more affluent as a result of general house price growth as well as income growth (but post retirement income from pensions could become a concern if they do not achieve anticipated values). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Clearly, the economic slowdown will impact upon disposable income and pension pots with more cautious spending patterns in the immediate future.
- 3.5 Younger shoppers will have higher education fees to pay, will experience higher housing costs, they will be more computer literate and spend more on-line. They will also spend more on entertainment/leisure so they may have less to spend in the retail sector.

Income and Expenditure

- 3.6 Incomes and expenditure grew strongly during the last 20 years, with retail expenditure growing faster than incomes. Overall, retail expenditure has increased by about 3.29% pa in real terms between 1990 and 2008, with most of this growth on comparison goods where an annual growth rate of 5.67% has been in effect between 1990 and 2008. Convenience goods spend has been growing at a much lower rate with a steady increase of under 0.86% per annum.⁴
- 3.7 Recent economic circumstances, however, have reversed this pattern of growth and the pace of economic recovery is expected to affect expenditure growth until at least 2012 when it is anticipated that stronger, though still moderate, growth will ensue. The rapid deterioration in the economy's performance during the final months of 2008 has had far-reaching implications for available income and, consequently, expenditure. The outputs from this study take into account these events and the effects of the recession. Experian report as follows:
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³ Office of National Statistics, 2010

⁴ ONS, Consumer Trends June 2009

"The UK economy is recovering from the severe recession of 2008/09, but growth is patchy and risks of relapse persist. Domestic demand is restrained by high unemployment and rising under-employment, a lacklustre outlook for investment, pressure on public finances and the weight of household debt".⁵

- 3.8 Verdict reported that economic deterioration was rapid with the fourth quarter of 2008 seeing a year-on-year decline of 1.5% - one of the sharpest contractions in economic growth since the early 1980s. 2009 brought a sharp contraction in activity and more recent reports suggest that 'growth will be lacklustre. However, as GDP growth improves through 2012 onwards, retail expenditure should also benefit'.⁶
- 3.9 Growth projections used in retail studies and supporting retail statements for planning applications should therefore respond to the most up to date advice in respect of economic expectations. There are two main accepted approaches for forecasting per capita expenditure growth. The first is based on an extrapolation of trends and the second is based on forecasts using an econometric model of past trends and other economic variables. Due to the retail expenditure boom in the latter half of the 1990s and the first half of the 2000s and the major economic recession which followed, there are significant differences between these two approaches.
- 3.10 Trend growth rates have, until recently, been influenced by the spending boom of recent years (until 2007). Trend line forecasting, based on these historic trends, incorporate booms and busts since the 1960s and therefore provide a flat rate average over long and ultra long-time periods. These are no longer appropriate for short-term retail projections given the current slow-down in the economy. The period up to 2016 will be affected noticeably by the severe recession and the weak upturn that is likely to follow due to the severe spending cuts and taxation increases planned.
- 3.11 The growth projections used within this report have therefore responded to advice in respect of the use of forecast growth rates based on consumer expectations. The use of such rates is supported by the latest Experian's Retail Planner Briefing Note 8.1 (August 2010) which sets out that:

⁵ Experian Retail Planner 8.1 (August 2010)

'We believe that because of the significant constraints on economic activity over the next few years....and the slower growth forecast for consumer spending in the longer term, it is appropriate to use the forecast growth rates...rather than either the long-term, medium term or ultra long-term trends'.

- 3.12 On this basis we are advised to use the economic forecasts prepared by MapInfo/Oxford Economic Forecasting and Experian Business Strategies which take into consideration current and future economic instability. Where there are differences between Experian and Oxford Economics, an average of their forecasts is adopted. Evidently, these forecasts affect the growth rates used for our retail capacity forecasting and have subsequent implications on the levels of floorspace town centres can sustain in the short-to-medium term, i.e. up to 2016.
- 3.13 Non-store retail sales, excluding e-tailing, are expected to decline over the next ten years, but this will be more than offset by the growth of e-tailing, resulting in overall growth in non-store sales in absolute and percentage terms. E-tailing is increasing strongly by both bricks and mortar retailers and non-store virtual retailers, but the rate of growth now seems to be slowing.
- 3.14 Experian published a note on 'non-store retailing' in March 2010 setting out revised estimations of Internet retail sales which are much higher than previously expected. These estimations are based on revised ONS data which adopts an improved methodology of all sales made over the Internet covering 95% of the retail sector in terms of turnover. The ONS series previously suggested in mid-2009 that Internet sales were 3.5% of total retailing sales, but the revisions now suggest the figure is nearly double this. In their note, Experian provide forecasts to 2026 which take into account the impact of broadband technology, speed of access to the Internet, problems of delivery and receipt of goods when away from home at work etc.
- 3.15 The impact of growth in e-retailing on future demands for retail floorspace is an important consideration and has been factored into the forecasts set out later in this report. Factors such as the processing of online grocery orders by retailers such as Tesco in local stores, and the potential use of shops as showrooms and/or collection
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⁶ Verdict Datamonitor, July 2010, UK Retail Futures 2014: Retail and the Economy

points may mean that the growth in Internet sales will not necessarily lead to an equivalent reduction in floorspace requirements. See the subsection on Internet shopping and e-tailing below for more information.

- 3.16 According to Verdict, customers are becoming more selective in their purchasing habits as they become more concerned about the economic outlook. With rising living costs, disposable incomes are being squeezed, and as a result customers are shopping around more to find the best possible value. Increasingly retailers are finding it harder to please customers and across all sectors, retailers are converting fewer customers into main users and shoppers are less loyal to their main stores. Such circumstances will have implications on retail capacity forecasting, particularly over the short-term.
- 3.17 Consumer spending is likely to remain weak over the coming years. Taxes are rising to pay off substantial government debt, wage growth is slowing and unemployment is rising; consumers are prioritising debt reduction; these factors are expected to combine to offset any advantages from falling inflation and ensure that spending will remain low. However there will be pockets of growth as the weak pound encourages increased tourism activity.⁷
- 3.18 On the basis of uncertainty over current forecast levels of growth in expenditure we strongly recommend that the capacity forecasts set out in Section 6 are updated at appropriate intervals to reflect updates to expenditure and population projections, and to build in the impact of new development and commitments over time.

Sales Efficiency

- 3.19 In undertaking retail capacity and impact assessments it is generally accepted that an allowance should be made for growth in the turnover 'efficiency' (or 'productivity') of existing retail floorspace to reflect retailers' ability to improve their productivity. This increased efficiency helps maintain the vitality and viability of town centre businesses.
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⁷ Verdict Research: "UK Sectors Summary Q4, 2009"

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- 3.20 An efficiency growth rate represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies and PPS4 also advocates the use of "*a realistic assessment of...forecast improvements in productivity in the use of floorspace*".⁸
- 3.21 Although hard quantitative evidence is limited, comparison businesses in particular have, over time, increased sales densities by achieving improvements in productivity in the use of floorspace. PPS4 (EC1.4.c.iii) requires that quantitative need assessments have regard to a realistic assessment of such improvement. Analysis of past data is difficult as sales densities increases have been affected by changes in the use of retail floorspace over the last 20 years, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday-trading and longer opening hours and the very strong growth of retail expenditure relative to the growth in floorspace.
- 3.22 Evidently, in the current economic climate many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, have led retailers into closure, such as Woolworths and Adams. With the expectation of weaker expenditure growth in the future, sales density growth is also expected to decrease.

Employment

- 3.23 Between 1998 and 2007 retail expenditure has increased by approximately 5.5% per annum, but retail employment has increased much more slowly. Over the same period total employees in retail employment in Great Britain have increased from 2.63 million to 2.76 million, an increase of 0.5% per annum. However, this growth has been made up mostly part time employment. Full time equivalent (FTE) employment has increased very little.⁹

⁸ PPS4, Paragraph EC1.5.c.iii

⁹ Annual Business Enquiry, 2009

3.24 Over the next 15 years Experian Business Strategies expect a 13% increase in FTE employment in the retail sector with a slightly higher increase in part time employment. Evidently, this needs to be monitored in the forthcoming years based on the slow down in the economy and corresponding growing levels of unemployment with significant consequences for available retail expenditure and retail sector employment positions.¹⁰

Size of Units

3.25 Growth of multiple traders and increased competition between companies means that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre development that has been able to accommodate this demand for larger sized units (typically 500-2,000 sqm or larger) have grown in importance, reinforcing the trend of higher order centres and out-of-centre retailing growing in relative importance (i.e. polarisation in the retail hierarchy).

3.26 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (greengrocers, butchers, fishmongers, bakers etc), and a large increase of superstores. This is indicated by Verdict Research which shows a 5.5% reduction in the total number of convenience stores between 1998 and 2008, as space is concentrated into a smaller number of larger stores.

3.27 Over the same time period the number of superstores (>2,323 sqm net) has increased by 39%; food specialists and off licences/tobacconists have also declined - by 32.9% and 56.6% respectively. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples.¹¹

3.28 Out-of-town store sizes have also increased in size between 1998 and 2008, over the period average out-of-town store sizes have increased from 1,939 sq m by 5% to 2,037

¹⁰ Experian, FTE Employment Levels, Retailing (SIC 2003 code 25)

¹¹ Verdict Research, Datamonitor: "UK Food and Groceries Retailers 2009"

sq m.¹² Average town centre retail store sizes increased slightly between 1998 and 2008, rising from 183 sq m to 193 sq m, an increase of 5.5%.¹³

Foodstores

- 3.29 Due to the restrictions on developing large new foodstores, there has been growth in the number of applications for the extension of existing foodstores and an adjustment in the composition of floorspace within existing stores over the last ten years. There has been increased emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and profit margins are greater, although sales densities are often lower.
- 3.30 This trend poses an increasing threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services. According to Verdict, comparison goods floorspace in the larger format stores of the top four grocers now accounts for averages of between 18% (Morrisons) and 40% (Asda) of net retail floorspace.¹⁴

Internet Shopping / e-Tailing

- 3.31 Internet sales are growing rapidly and affecting how and where we shop, although the growth rate slowed markedly in 2008. In the early days of Internet retailing, back in the late 1990s, growth was due to the emergence of virtual retailers. Things have moved on in recent years and recent research indicates that much of the growth in Internet sales has been from sites of established retailers (e.g. Tesco, Argos, John Lewis etc.), who are creating "virtual outlets" to expand their market shares of retail spend.
- 3.32 In 2008 there was an increase of 1% in the number of Internet users to 35.4 million people, and an 18.1% increase in online shoppers to 26.7 million shoppers. As technology continues to improve, it will fuel further growth in the market. Overall the

12 Verdict, Datamonitor: "UK Out-of-Town Retailing 2009"

13 Verdict Research, Datamonitor: "UK Town Centre Retailing 2009"

14 Verdict Research: "Grocery Sales Analysis Sheet", 2008

Internet shopper population is forecast to grow by approximately 50% between 2007 and 2012. In addition to this increase the amount of money the average Internet shopper is spending online is also increasing, average online spend per person rose by 5.8% between 2007 and 2008.¹⁵

- 3.33 High street retailers have particularly benefited from the growth of Internet shopping as their brand are widely recognised and trusted by consumers. They also benefit from greater buying power, which means they are often able to offer discounts. Price-comparison sites have also increased the trend towards price cutting on the Internet, particularly in relation to small electrical products, CDs and software.
- 3.34 Despite this growth, e-tailing still only accounts for a fraction of total sales for mainstream retailers in the UK. Furthermore, sales on the Internet have to some extent been a switch from mail order and for some retailers (e.g. Tesco) involve sales from retail rather than warehouse floorspace. Even where sales are from warehouses, retail floorspace may still be required to fulfil a showroom function. In addition there are a growing number of signs that the Internet is beginning to mature and enter a new, more subdued phase of growth. Growth in the number of shoppers in 2008 was strong, but significantly less than growth seen in 2007.¹⁶
- 3.35 Verdict predicts a significant alteration in the products and sectors which consumers shop for online coming out of the recession. It is anticipated that the recession will leave a lasting impact on consumer attitudes towards spending and with the advantage of low price and added convenience; the Internet is expected to become even more attractive to shoppers. The offer of cheaper connections and other incentives expect to see the take up rates of less affluent shoppers achieve substantial growth. Verdict also anticipate significant growth in older shoppers (55+) which will eventually become a crucial target for retailers; particularly as within 10 years Internet-adept 35-44 year olds will move into the 55+ demographic, taking their Internet shopping habits with them.

15 Verdict Research, "e-Retail Storms Ahead Through the Recession", June 2009

16 Verdict Research, "e-Retail Storms Ahead Through the Recession", June 2009

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- 3.36 As a consequence of this growth, there will continue to remain reasonable pressure on the traditional brick and mortar retailers in the UK's town centres. Shoppers are able to select their own retail mix online and shopping centres will need to compete with this choice, which is not only driven by price and range, but also service and expertise. Town centres will increasingly have to provide a shopping 'experience' that the Internet is unable to match. In accordance with PPS4, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.

Leisure Trends

- 3.37 Due to increased affluence and mobility, and the rise of the internet, shoppers no longer merely shop to satisfy 'needs', they increasingly shop to satisfy 'wants' as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure.
- 3.38 Quality restaurants, coffee shops, cafes and bars, as well as multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important for attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.
- 3.39 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable. Town centres can offer consumers a much more vibrant atmosphere in which to eat and drink and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health and fitness clubs, the attraction of the town centre is 'daytime trade' and the ability to capitalise on proximity to businesses and shoppers.
- 3.40 The leisure industry has enjoyed buoyant market conditions over the last decade as a result of growing levels of disposable incomes and low unemployment. Much of the growth has been fuelled by an increase in the number of 'cash-rich, time-poor' consumers who have been prepared to pay a premium price for convenient services

in order to save time. Leisure time has become a precious commodity to consumers and in order to maximise free time, consumers have often combined leisure activities as part of an overall going out experience. The range of leisure choices has also grown considerably leading to an increase in competition in the industry.

- 3.41 The recession has brought many challenges for the leisure industry. On one hand, the industry is considered to be particularly exposed to the economic downturn due to the discretionary nature of leisure expenditure, but contrary to this leisure activities remain an important lifestyle choice for many consumers and who will prioritise leisure over other areas of spending.

Summary

- Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. This has seen corresponding increases in sales densities within existing retail floorspace, which has also been driven by factors such as high value space efficiency and longer opening hours. Crucially, for Wiltshire's main towns however, the current economic slow down will have an impact on the retail sector, and growth forecasts will need to reflect recent publications from Experian Business Strategies.
- Heightened mobility through increased car ownership, alongside growth in affluence, has favoured larger centres over smaller centres. Shoppers are more willing to travel further a field to higher order centres which have increased in size and importance relative to smaller centres, leading to a consequent fall in their market share. As such, PPS4 now encourages local authorities to be pro-active in trying to encourage development in smaller centres.
- The composition of town centres has changed through new development, with a growing number of companies requiring larger shop units to meet their shop format ratios. This has again favoured the larger centres which generally have the space to meet such retailer requirements. This is particularly noticeable in the convenience sector, which has begun to offer an increasing supply of comparison goods in the larger foodstores, in addition to the traditional product offer; such stores therefore require more retail floorspace. The dominance of such foodstores has led to current recent concerns about market dominance and the lack of competition.

- Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure – although this may change in the coming months. Nevertheless, the mix of uses in a town centre is vital to offer choice to shoppers, and quality restaurants, coffee shops, cafes, bars and other leisure facilities are all important to encourage frequency of visit and longer stay times.
- As competition from the internet increases, town centres need to offer a quality destination where people want to spend time and gain access to facilities not available on the web. There has been a continued polarisation towards larger centres and the provision of larger stores in these larger centres. Where smaller centres have been unable to diversify their offer or create niche markets and a mix of retail, leisure and service facilities they have suffered.

4. Sub-Regional Context

4.1 This section examines the retail performance of the Wiltshire centres in the context of the retail network across the wider sub-region. We will highlight the relationship of the centres in Wiltshire with the wider sub-region, and in particular the influence of key competing strategic centres on the current and future role of Wiltshire's centres. We identify the main retail offer and floorspace provision in each competing centre, and the extent to which this is likely to change and influence shopping patterns in the region in the future.

Shopping Catchment Analysis

4.2 Our analysis draws on the household telephone survey results (described in more detail in Section 6) and other data (including PROMIS, Javelin Retail Rankings, the Focus Property Intelligence database, the Valuation Office Authority and EGi). Qualitative research was also undertaken to establish major pipeline development proposals in competing centres.

4.3 The Household Telephone Survey (explained in more detail in Section 6) highlights that the key centres that compete with the Wiltshire centres include Bristol, Poole, Southampton, Swindon, Bournemouth, Bath, Basingstoke, Cirencester, Newbury, Andover and Yeovil. The main shopping centres that compete with the Wiltshire centres include Castlepoint Shopping Park in Bournemouth, Orbital Shopping Park in Swindon and Cribbs Causeway in Bristol. The location of the main city and town centres in relation to Wiltshire is illustrated on Plan 1.

4.4 Shopping patterns derived from the survey allow us to calculate the amount of comparison goods expenditure that each competing centre draws from the survey area (see Plan 3). This indicator takes into consideration the strength of the retail offer as well as the centre's accessibility and distance from Wiltshire centres. The total expenditure flowing to these centres is set out in Table 4.1 below (Appendix 1), and the comparison goods market share of each centre is set out in Plans 4 – 16. The survey area is split into 28 individual zones covering the main centres within Wiltshire.

Table 4.1: Study Area Comparison Goods Trade Draw: Key Competing Centres

Centre	£(000s)	Market Share (%)
Swindon	388,664	11.0
Bath	341,296	9.7
Salisbury	270,621	7.7
Southampton	176,606	5.0
Trowbridge	136,375	3.9
Chippenham	109,805	3.1
Poole	99,928	2.8
Andover	90,351	2.6
Cirencester	78,370	2.2
Bournemouth	69,897	2.0
Yeovil	52,261	1.5
Newbury	39,077	1.1
Bristol	31,415	0.9

Source: GVA Household Telephone Survey, June 2010 / Plan 3 / Appendix 1

- 4.5 Table 4.1 clearly shows that a high proportion of expenditure is being lost out of the Wiltshire Council area. Swindon is the most dominant centre in terms of comparison goods trade drawing circa £388.7m of comparison goods expenditure (11%) out of the survey area (zones 1-28).
- 4.6 Bath City Centre has the second strongest comparison goods trade drawing £341.3m of comparison goods expenditure (9.7%) from the survey area. The highest performing centre in Wiltshire is Salisbury, which draws circa £270.6m of comparison goods expenditure (7.7%) from the survey area. Southampton city centre is one of the largest centres in the south of England and the strong retail provision in the city draws a significant market share from the survey area.
- 4.7 Trowbridge, Chippenham, Poole and Andover attract respective trade draws of £136.4m, £109.8m, £99.9m and £90.4m. Trowbridge and Chippenham are smaller than other competing centres but they fall within the survey area and consequently a greater proportion of their catchment areas are covered, hence these towns have a larger percentage market share than larger towns that sit outside the survey area.

- 4.8 We consider Swindon, Bath and Southampton to be the largest competing centres to the Wiltshire centres and combined they draw 25.5% of expenditure from the survey area. The top three Wiltshire centres (Salisbury, Trowbridge and Chippenham) only draw 14.7% of expenditure out of the survey area, indicating that there is significant leakage of expenditure out of Wiltshire.
- 4.9 The relatively weak performance of other sub-regional centres such as Cirencester, Yeovil and Newbury reflects their size. Bournemouth and Bristol, despite being larger centres are a further distance from the survey centre and as a result people appear to be less willing to travel to these destinations.

Profile of Competing Centres

- 4.10 The vitality rank of each competing centre has been derived from Javelin Venuescore (2009). Javelin Group's Venuescore provides an up-to-date ranking of UK shopping venues across a number of key indicators – scale, market positioning, fashionability, age and positioning of the retail offer. The score attached to each operator is weighted to reflect their overall impact on shopping patterns. For example, anchor stores such as John Lewis, Marks and Spencer and Debenhams receive a higher score than smaller retailers to reflect their major influence on shopping patterns. The resulting aggregate score for each venue is called its Venuescore.

Table 4.2: Javelin Retail Rankings of Key Competing Centres

Centre	Rank (2010)	Previous Rank Position (2007)
Bristol	12	27 (↑)
Southampton	14	11 (↓)
Bath	22	26 (↑)
Salisbury	59	41 (↓)
Bournemouth	62	84 (↑)
Basingstoke	63	59 (↓)
Swindon	65	55 (↓)
Poole	124	116 (↓)
Yeovil	143	118 (↓)
Newbury	156	151 (↓)
Andover	201	205 (↑)
Cirencester	249	232 (↓)
Trowbridge	271	320 (↑)
Chippenham	398	366 (↓)
Devizes	558	543 (↓)
Warminster	579	502 (↓)
Marlborough	706	644 (↓)

Source: Javelin Venue Score 2010

- 4.11 It is evident from Table 4.2 that Bristol is the strongest performer, ranked 12th, having significantly improved on its 27th position in the 2007 rankings. Southampton, Bath, Salisbury, Bournemouth, Basingstoke and Swindon also perform well in the rankings. Salisbury is the highest ranking centre in the Wiltshire district, although the centre's position has slightly dropped since 2007. We understand there has been a change in the re-grouping of shopping boundaries which means that Salisbury has now been separated from Wilton Shopping Village, and as a result the centre's rank is likely to have fallen as a result of this separation.
- 4.12 Poole is ranked at 124th, whilst Yeovil, Newbury, Andover and Cirencester are ranked 143rd, 156th, 201st and 249th, respectively. Trowbridge has significantly increased its ranking by 49 places to 271st in 2010; however, Chippenham has slipped slightly down the rankings falling 32 places to 398th. There is not always a clear explanation as to

why these centres have changed positioned. However, Trowbridge's increase is likely to be as a result of the opening of The Shires Gateway development to the west of the centre, explained in more detail in Section 5.

- 4.13 The centres of Devizes, Warminster and Marlborough feature much lower in the rankings, with all of the towns falling down the rankings between 2007 to 2010 indicating that these centres have struggled to maintain their competitiveness with other centres of a similar size.
- 4.14 Table 4.3 (below) highlights that Southampton city centre attracts the highest prime rental rates in 2009 at £3,767 per sq m with the next nearest centres being Bath and Bristol commanding average rental rates of £2,422 and £2,153 per sq m respectively. The six centres of Bournemouth, Swindon, Basingstoke Salisbury, Poole and Newbury average between £1,000 – 2,000 per sq m, with the other centres of Yeovil, Andover, Cirencester, Trowbridge, Chippenham, Marlborough and Devizes averaging between £500 - £900 per sq m. Southampton prime retail rents are over six times that of the lower order centres, reflecting the centre's dominance in the region.
- 4.15 Southampton and Bristol's prime retail rents have increased between 2005 and 2009. Interestingly, retail rents in Marlborough have managed to achieve a significant increase between 2005 and 2009, potentially due to the constrained supply of retail floorspace in the centre which has pushed rents up. Rents in Salisbury and Yeovil have remained static between 2005 and 2009, highlighting that these centres are performing adequately over this period whereas the retail rents for all other centres, have fallen during this period.
- 4.16 The highest fall in retail rents have been in Bournemouth and Swindon, which have fallen by over 18% and 17% respectively between 2005 and 2009, although rents here remain higher than those of Wiltshire's largest centre, Salisbury. Trowbridge, Chippenham and Devizes' rents are the lowest of the centres, and have fallen by between 7% and 10% over the period 2005 to 2009; however this fall is relatively minor considering the fall in rents experienced in centres such as Bournemouth and Swindon. These falls are likely to be as a result of the downturn in the market between 2008 and 2009.

Table 4.3: Annual Prime Retail Rents of Competing Centres

Centre	2005 (£ per sq m)	2009 (£ per sq m)	% Change
Southampton	3,498	3,767	7.7
Bath	2,583	2,422	-6.23
Bristol	1,991	2,153	8.14
Bournemouth	1,991	1,615	-18.88
Basingstoke	1,722	1,615	-6.21
Swindon	1,830	1,507	-17.65
Salisbury	1,292	1,292	0
Poole	1,292	1,076	-16.72
Newbury	1,238	1,076	-13.09
Yeovil	915	915	0
Andover	861	807	-6.27
Marlborough	646	807	24.92
Cirencester	753	646	-14.21
Trowbridge	700	646	-7.71
Chippenham	646	592	-8.26
Devizes	538	484	-10.04

Source: Colliers in Town Retail Rents

- 4.17 Low retail yields are one indication of a well performing centre within their intended role in the retail hierarchy, and enables comparison on a like for like basis. The yield on a property reflects the annual rental income represented as a percentage of the value of the property; low yields therefore indicate high property values and strong investor confidence in the future performance of the centre as a whole.
- 4.18 Table 4.4 illustrates that as with other key indicators of performance, Bath, Southampton and Bournemouth have some of the lowest retail yields of those centres featured in the survey results. For instance, Bath had a retail yield of 4.5% in July 2008, which is the lowest of the competing centres and represents an improvement of 0.5% on its position in July 2005 (5%).
- 4.19 Six Wiltshire centres (Trowbridge, Chippenham, Devizes, Marlborough, Melksham and Warminster) have the highest retail yields of all the centres. However all of the Wiltshire centres have all improved their retail yields since 2005, which could be perceived as a sign of healthy investor confidence, whereas yields in Bristol and Swindon have risen between 2005 and 2008.

Table 4.4: Prime Retail Yields of Competing Centres

Centre	2005	2008	% Change
Bath	5	4.5	-0.50
Southampton	5	4.5	-0.50
Basingstoke	5.5	5	-0.50
Bournemouth	5.5	5	-0.50
Yeovil	6.75	5	-1.75
Newbury	5.5	5.25	-0.25
Bristol (Broadmead)	5	5.5	0.5
Swindon	5.25	5.5	0.25
Salisbury	6.5	5.75	-0.75
Poole	7	6	-1
Cirencester	7.5	6	-1.5
Andover	7	7	0
Trowbridge	8.5	7	-1.5
Chippenham	7.5	7	-0.5
Devizes	8.5	7	-1.5
Marlborough	9	7.5	-1.5
Melksham	9	7.5	-1.5
Warminster	9.5	8	-1.5

Source: Valuation Office Agency – Property Market Report

- 4.20 The strong performance and dominance of centres outside of Wiltshire is also evident when examining the number of retailers looking for new retail space in the centres (Table 4.5). Bristol currently had 104 retailer requirements registered on the Focus database at August 2010, reflecting a high level of demand to locate in the city. Below Bristol are the centres of Bath with 71 requirements, whilst Southampton and Bournemouth have 54 and 45, respectively. In comparison, Swindon, Newbury, Salisbury and Poole all have much lower levels of retailer demand, but the centres with the lowest levels are Cirencester (9 requirements), Basingstoke (8), Chippenham (8), Trowbridge (5), Andover (4) and Yeovil (4).
- 4.21 Demand for retail floorspace in centres has declined in the last 3 years due to the downturn in the market. Traditionally multiple retailers generally seek presence in larger more dominant regional centres such as Bristol and Bath. However, not all retailers register requirements on the focus database which can distort the overall picture. The prospects of future retail development in a centre, such as The Maltings and Central Car Park site in Salisbury, can also change retailer's perceptions of a centre and lead to further retail interest in a centre.

Table 4.5: Retailer Requirements for Competing Centres

Centre	No. of Requirements
Bristol	104
Bath	71
Southampton	54
Bournemouth	45
Swindon	18
Newbury	16
Salisbury	15
Poole	14
Cirencester	9
Chippenham	8
Basingstoke	8
Trowbridge	5
Andover	4
Yeovil	4

Source: Focus, August 2010

Pipeline Schemes

- 4.22 We now review developments in the pipeline in competing centres to assess the likely increase in attractiveness that may compound trade leakage and the impact this may have on Wiltshire's retail performance over the forthcoming LDF period.
- 4.23 In Bristol in 2008, a mixed use redevelopment scheme at Cabot Circus, Broadmeads opened, rejuvenating the retail provision. Several major redevelopment schemes are proposed within Bristol, which if built will strengthen the role of the city centre. Some of these schemes are subject to delays or are on hold due to the ongoing economic problems. Notable permissions recently granted include a mixed use development at Wapping Wharf which was granted in 2007, for a retail floorspace of approximately 4,000 sq m net. Temple Quay Plots ND2-ND5 (currently under construction), the second phase of the successful Temple Quay development, which will provide a further c. 2,100 sq m net additional retail floorspace. The third phase, Temple Quay 3, is at pre-application stage and could provide a further c. 27,800 sq m net retail

floorspace in the centre. There are two other significant town centre schemes in the pipeline at St Mary Le Port and Redcliff Wharf which could provide a further 12,000 and 2,700 sq m net retail floorspace, respectively.

- 4.24 In Southampton, the retail offer significantly increased in 2000 with the opening of West Quay Shopping Centre. The shopping centre provides a net retail floorspace of over 74,000 sq m, anchored by John Lewis and Marks and Spencer. In 2009 Ikea opened in the city centre, providing approximately c.31,300 sq m comparison floorspace. In 2010 an outline planning application was approved for an extension to the shopping centre, Watermark West Quay. The Watermark extension will provide a further 34,700 sq m retail floorspace in a mixed use development with hotel and cinema uses, although it is not yet known when the site will be developed.
- 4.25 The dominant pipeline scheme in Bath is the Southgate Centre development. Phase 1 was completed in November 2009, Phase 2 opened in May 2010 and Phase 3, the anchor Debenhams store, was due to open in September 2010. The Southgate Centre will provide approximately 19,800 sq m net retail floorspace in Bath city centre.
- 4.26 Proposals in Swindon include the redevelopment of the Bhs block at The Parade. The reconfiguration of the block will provide over 7,400 sqm total gross floorspace and the development is under construction with units having been pre-let to Bhs, Topshop and River Island. At Regent Circus outline planning permission has been granted for a mixed use retail, office and leisure scheme, including 3,700 sq m retail floorspace. Major town centre proposals developed by New Swindon Urban Regeneration Company are postponed due to the lead developer going into administration.
- 4.27 In Newbury, a new shopping centre, Park Way, is currently under construction and due to open in Autumn 2011 and will provide over 26,000 sqm gross retail floorspace. We understand the anchor stores at Park Way will be Debenhams, Marks and Spencer and H&M. Whilst Newbury is located to the east of the study area, it is likely that this new development will compete for trade with Basingstoke and Reading than Wiltshire's centres. Pre-application discussions are also being held for the Station Area development, a residential scheme that is likely to include retail floorspace. Net additional retail gross floorspace could amount to 1,800 sqm.
- 4.28 Retail schemes in the pipeline for Bournemouth are relatively small scale. The most significant development is St Paul's Square which was granted planning permission in

2007 for a mixed use development including 784 sqm gross internal retail floorspace. There are no major outstanding planning permissions for large retail development in Poole. It is understood that the Council are in discussions about the redevelopment and extension of the Dolphin Centre shopping centre which could provide 18,600 sq m gross retail floorspace. In Yeovil, planning permission was granted for an extension to the Quedan Shopping Centre. If implemented, the scheme could provide an additional 10,200 sqm of retail floorspace. In Andover permission was granted in 2007 at a site adjacent to the Chantry Centre for a mixed use scheme for restaurants (836 sqm), hotel and residential. This permission has yet to be implemented, and a revised scheme with less restaurant floorspace was submitted in 2009 and is currently pending. There are no reported major pipeline projects in Cirencester. In Basingstoke, Festival Place Shopping Centre opened in 2002 and now dominates the retail provision of the town centre with 93,000 sqm gross retail floorspace.

- 4.29 The competing centres of Bristol, Bath, Southampton, Swindon and Newbury have all supported new town centre shopping schemes over the last few years, some of which are already trading, and others are currently under construction. The development proposals in the centres will reinforce the attractiveness of these centres, and could potentially further erode Wiltshire's market share of available comparison retail expenditure within the survey area.

Summary

- The household telephone survey has identified Swindon, Bath, Southampton, Poole, Andover, Cirencester, Basingstoke, Bournemouth, Yeovil, Newbury and Bristol as the Wiltshire centre's main competing centres. Our review of the key performance indicators confirm the higher order shopping roles of Swindon, Bath and Southampton, which are located outside Zones 1-28 of the survey area. They have a superior retail offer and increasingly mobile shoppers and new retail development have led to a continued influence on shopping patterns in Wiltshire's catchment area. Salisbury, Chippenham and Trowbridge are Wiltshire's strongest performing centres, however a significant proportion of expenditure (25.5%) is lost to Swindon, Bath and Southampton. The centres of Devizes, Marlborough and Warminster have significantly lower retail rankings, rents and yields than competing centres.

5. Performance of Wiltshire's Centres

- 5.1 In accordance with guidance set out in PPS4 we have undertaken detailed health checks to measure the vitality and viability of Wiltshire's centres. These comprise the three strategic centres of Salisbury, Trowbridge and Chippenham, and the market towns of Amesbury, Bradford-on Avon, Calne, Corsham, Cricklade, Devizes, Ludgershall, Malmesbury, Marlborough, Melksham, Tidworth, Warminster, Westbury and Wootton Bassett.
- 5.2 We also examine the smaller village centres of Pewsey, Wilton, Mere, Downton and Tisbury, although due to the size of some these centres, certain data is not available for these centres. The health checks determine the current status of health and highlight any qualitative deficiencies which need to be met in planning for the future of the centres.
- 5.3 Our review of the centres existing frontages is set out in Appendix 7, which also includes our recommendations about whether these frontage policies should be altered in line with the latest guidance in PPS4.

Strategic Centres

Salisbury City Centre

- 5.4 Salisbury is a medieval city located in the south east of Wiltshire, approximately 24 miles north-west of Southampton and 25 miles north of Bournemouth. Other competing centres are located slightly further away, with Salisbury 37 miles south of Swindon, 38 miles south east of Bath and 40 miles west from Basingstoke. The city is the main centre in south Wiltshire, a predominantly rural area. Salisbury is an international tourist destination due to the Cathedral and the proximity to Stonehenge. Retail expenditure in the city is enhanced by 3.3 million tourists and visitors per annum. The city is historic and attractive, and the retail offer in the city centre is enhanced by independent specialist stores and local markets.
- 5.5 The primary shopping area in the city is complex and extensive due to its medieval street pattern and is defined in detail in the Salisbury Local Plan 2011 City Centre Inset

Map. Key primary shopping streets include Castle Street, Blue Boar Row, Queen Street, Oatmeal Row, Minister Street, Silver Street, Butcher Row, Fish Row, New Canal, High Street, Catherine Street and the Old George Mall shopping centre. Salisbury city centre has three managed shopping centres, Old George Mall, The Maltings Shopping Centre and Cross Keys Mall.

- 5.6 The Salisbury Vision document (2008) outlines a number of regeneration projects aimed at achieving the vision for 'Salisbury to be a clean, green, safe a friendly city; a place that is consistently acknowledged as being one of England's best places to live'. Key initiatives include the major redevelopment of the Maltings and Central Car Park site as a retail-led mixed use scheme to provide additional large floorplate retail premises to attract more multiple retailers to the centre. Transport improvements to Southampton Road/Eastern Gateway will be developed through the development of a residential-led scheme with other uses to include offices, community and local retail and bulky goods retail alongside the existing uses.
- 5.7 The document outlines the main hotel and leisure development opportunity is at Chipper Lane/Scots Lane where buildings currently have a poor visual quality and could be redeveloped to increase the number of hotel rooms in the city. Another key development opportunity is the redevelopment of the Market Place to provide a high quality public space for residents and enhanced space for the markets held there. Public realm enhancements will also be promoted in areas including Fisherton Square (adjacent to the Playhouse and City Hall) and Salisbury Chequers which will improve the streetscape and improve legibility and pedestrian accessibility across the centre.

Accessibility

- 5.8 Salisbury has good accessibility by several modes of transport. The city is located on several major roads including the A36, A30, A338 and A354. There are 11 car parks across the centre which provide approximately 2,850 spaces. A park and ride scheme is also in operation in the city, provided in five sites on the main routes into Salisbury. Park and ride car parks provide a further 2,000 parking spaces and buses link to the city centre every 12 to 15 minutes.
- 5.9 Public transport provision to the city centre is also good. Coaches provide transport from Salisbury to London, Bath and Bristol. Local buses connect Salisbury to the local centres of, Amesbury, Devizes, Pewsey, Bournemouth, Southampton, Shaftesbury and

Tidworth. Salisbury railway station is located to the west of the town centre on South Western Road. By train, Salisbury is connected to central London with a direct train to Waterloo, and other major cities accessible by train include Bath, Bristol, Portsmouth, Exeter and Southampton. Local centres accessible by train include Warminster, Trowbridge, Andover and Gillingham (Dorset).

Diversity of Uses

- 5.10 The most recent Wiltshire Council survey of August 2009 found that Salisbury city centre has a relatively good mix of comparison, convenience retail and service uses (see Table 5.1 below). Representation of comparison and service units is particularly strong and is 5.79% and 17.14% above the national average respectively. Service units constitute over half of the total number of units in Salisbury city centre (52%). Convenience retailers are slightly below the national average (-3.75%).

Table 5.1: Salisbury Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	28	252	375	61	716
Percentage of Total (%)	3.91	35.20	52.37	8.52	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-3.75	5.79	17.14	-1.34	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, August 2009 Survey

Convenience

- 5.11 Major foodstores in the city centre include a Sainsbury's in The Maltings and a Tesco Metro on Castle Street. Sainsbury's occupies a large site at The Maltings, adjacent to Salisbury City Hall and Salisbury Playhouse, in the west of the city centre close to the train station. Sainsbury's is the largest food store in the centre and opened in 1986. The store has a total sales area of 2,021 sq m and offers an instore bakery and deli counter, as well as providing comparisons goods such as the TU clothing range.
- 5.12 Tesco Metro, which opened in 1969, is a slightly smaller store with a total sales area of 1,677 sq m. Tesco Metro is situated close to the Sainsbury's store, but is separated by the River Avon and gardens. The Tesco Metro provides a more limited range of

goods than the Sainsbury's store, although they do stock world food products. Notwithstanding these larger foodstores, there are other foodstores run by multiple retailers such as Iceland (Castle Street) and Marks and Spencer (New Canal) which provide a more limited range of food products.

- 5.13 In terms of other convenience goods stores there are a high proportion of bakers and confectioners and health food shops. There is a below average representation of butchers, convenience stores and off licenses. The Goad survey and the Wiltshire Council survey of 2009 both indicate that there are no fishmongers or greengrocers at all in the centre, which is not surprising given that these stores are generally found in centres lower down the hierarchy. Independent convenience retailers are distributed throughout the centre and complement the wider convenience goods offer.

Comparison

- 5.14 The Council's survey of August 2009 found there were 252 comparison goods stores in Salisbury which represent 35.20% of the total retail and service units. Main comparison goods shopping units are located along High Street, New Canal, Catherine Street and Butcher Row. The managed shopping centres also provide a good range of comparison shops. Old George Mall provides the largest variety of comparison goods with an overall floorspace of approximately 9,600 sqm. Stores here include, amongst others, an anchor Marks and Spencer, H Samuel Jewellers, HMV, JD Sports, Orange and Superdrug. Fat Face and Top Shop / Top Man have recently opened here. The Maltings provides a variety of convenience and comparison goods, anchored by Sainsbury's and also including Superdrug, Robert Dyas and Bakers Oven bakers. Cross Keys Mall is anchored by TK Maxx and smaller independent comparison stores provide the main retail composition.
- 5.15 Overall, Salisbury has an above average representation of ladieswear and accessories stores, antique stores, telephone stores, toys and games and DIY and home improvement stores. The centre has below average representation of chemists and toiletries, cosmetics and beauty stores, and slightly below average representation of menswear stores, carpets and flooring and vehicle and motorcycle sales.
- 5.16 A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple retailers in a centre can enhance the appeal of a shopping destination. In Salisbury there are 231 multiple retailers, representing 32.26% of all retail

and service units. Key multiple retailers in Salisbury include Marks and Spencer, Debenhams, Waterstones, BHS, WHSmiths, Boots and TK Maxx. Salisbury also has a number of the smaller multiples such as Fat Face, White Stuff, Crew Clothing, Laura Ashley and Monsoon. However, a number of mainstream high street retailers found in larger centres are not represented in the centre such as House of Fraser, John Lewis, Oasis, Hennes, Zara, and Foot Locker.

- 5.17 Salisbury city centre benefits from a good mix of national and local retailers. There is a strong representation of independent retailers and many of the retailers provide quality, specialist, and locally produced goods. Independent retailers in the centre include jewellers, bridal wear shops, furniture shops, gift shops and florists.
- 5.18 Fisherton Street, in the west of the town centre, provides a strong specialist shopping area. Independent retailers are dominant along this road with units selling furniture, antiques, art, health and beauty and restaurants. Fisherton Street has a unique character in contrast to the centre of Salisbury, and provides a good range of shops. The area benefits from a good location, connecting Salisbury train station to the western edge of the city centre. By foot, walking from the station to The Maltings takes approximately 10 minutes, along Fisherton Street. However, despite providing a link to the city centre, our site visit found that footfall on Fisherton Street was slightly lower than in the city centre. This indicates that the attractiveness of Fisherton Street needs to continue to be maintained in order to continue to promote linked trips between the city centre and the specialist shopping area of Fisherton Street.
- 5.19 The retail offer of the centre is enhanced by several local markets which take place at Salisbury Market Square. Salisbury Market Square is located in the centre of Salisbury city centre, bounded by Blue Boar Row, Queen Street, Ox Row and Oatmeal Row. Charter Market is a retail market held twice weekly (Tuesdays and Saturdays), a Farmer's Market is held fortnightly and a two day continental market is held three times a year. The open air market complements the convenience and comparison offer of the city centre, and provides an important hub of activity on market days.

Service and Leisure Uses

- 5.20 The number of service units in Salisbury is good, 17.14% above the national average. Service units are generally located within the secondary areas of the shopping frontage, along Castle Street, Winchester Street, New Street and Brown Street. Tourism

plays an important role in the local economy, with around 20% of respondents to the in centre survey classified as either day tripper, visitor or on holiday. The amount of tourists visiting the centre support the need for a higher than average amount of service and leisure uses in Salisbury city centre.

- 5.21 In terms of financial and business services there are an above average number of property services in the centre. A specialist area of property services is located at the top of Castle Street where our site visit of 3 August 2010 identified 15 estate agents. Other business services are more evenly dispersed throughout the centre. There is a below average representation of retail banks in the centre.
- 5.22 There is a good selection of quality hotels, restaurants and a range of bars and public houses. The main café provision is currently focused along Butcher Row, where outdoor seating is available during the summer months, however closer analysis of service provision indicates that there is a below average representation of cafes in the centre. Fisherton Street and Bridge Street have a number of restaurants dispersed along this road, and with the exception of Wagamama, are independent restaurants. There are a few chain restaurants located at the top of Market Place including Ask, Strada and Pizza Express. There is also a below average representation of fast food takeaways in the centre, although these uses are less desirable in centres than cafés / restaurants. The quality of bar provision in Salisbury is varied, and some are of a poor quality. There are no concentrations of restaurants and bars in the centre, which may be a contributing factor to the results of the telephone survey which indicate that only 7.6% of respondents visit Salisbury most often for evening eating and drinking.
- 5.23 There is a good range of leisure service uses in the centre including an Odeon cinema, Salisbury Playhouse Theatre, a Gala bingo hall, and an LA Fitness health and fitness club. The Odeon Cinema is the largest cinema in the survey area, and the results of the telephone survey show that it is also the most popular cinema destination within Wiltshire. The Salisbury Playhouse Theatre and Salisbury City Hall are located adjacent to each other near to The Maltings. These two venues provide a variety of evening entertainment including plays, comedy and live music.

Vacancies

- 5.24 The Wiltshire Council survey of August 2009 identified 61 vacant units in the city, 1.34% below the national average. Our site visit in August 2010 identified that the

composition of vacant units has slightly changed. For example a vacant unit on Fisherton Street has reopened as a cycle shop, whilst Mothercare in the Old George Mall and Baby Gap on New Canal have become vacant. The change in composition of the vacant units indicates that there is a cycle for small units to close and for others to re-open. The low number of vacant units indicates that the centre is healthy and performing well, however low vacancy rates also represent a barrier to growth because there is no space for retailers to enhance their provision.

- 5.25 Our site visit indicated there are no concentrations of vacant units equating to problem areas, although vacant units in the centre tend to be in secondary frontage areas including Winchester Street and New Street. The largest vacant unit is the former Woolworths unit on the High Street, with a floorspace of 3,400 sqm. Wiltshire Council and the Salisbury Journal have covered the windows of the store with large posters of the Cathedral and other views of the city, however due to the unit's size, the vacancy still dominates the High Street. The rest of the vacant units are generally small stores dispersed throughout the centre.

Environmental Quality

- 5.26 The quality of the environment in Salisbury is generally good. Historic narrow streets and traditional buildings along Minister Street and Queen Street are accompanied by more modern developments along Old George Mall and New Street to provide a range of retail units. In central locations most shop fronts are maintained to a high standard and public areas appear well looked after, with hanging baskets and street box planters. In more secondary areas, such as Winchester Street, Endless Street and Brown Street, the street environment is of a lower quality than central areas. These areas have more modern shop fronts, some of which need increased maintenance to improve the attractiveness of these areas. Paving is good throughout the city and lighting and CCTV is present in main shopping areas which improve perceptions of safety. Benches and litter bins are found across the centre and there appear to be no serious problems with litter and graffiti.
- 5.27 Due to the historic nature of the city, the street patterns are complex and extensive which adds to the character of the city. The narrow streets and walkways however do pose problems for pedestrian circulation, especially for tourists who may find problems navigating through the city. There are a good number of pedestrian

crossings throughout the centre, however the fragmented nature of shopping streets, especially in the primary shopping area could be improved. Pedestrianised areas of roads including Queen Street, Ox Row, Butcher Row, Fish Row and High Street add to the quality of pedestrian access throughout the centre.

Commercial Performance

- 5.28 In 2010, Venuescore retail rankings list Salisbury as the 59th highest scoring national shopping destination, the highest ranking centre in Wiltshire. The Venuescore ranking of Salisbury has however slipped since 2007, at which point the city was ranked 41st nationally. This is likely to be as a result of altered shopping boundaries since the previous ranking, but it also indicates that Salisbury needs to continue to enhance the shopping offer of the city centre to remain competitive.
- 5.29 The level of rent which retailers are prepared to pay for retail space within a centre is also a useful indication of the perceived strength of a centre (although factors such as the supply of floorspace also have an impact on rental value). Whilst town centre rental values have fallen from their 2008 value at £1,399 per sq m to £1,291 per sq m at 2009, this is a national trend generally accounted for by the economic recession. We note that rental values in Salisbury have fallen less than other centres in Wiltshire, indicating the dominance of Salisbury as a comparison destination in the area and that the city has managed to remain competitive and maintain its position against competing centres. This may be a result of the low vacancy levels across the city centre, which is keeping rental values relatively high.

Retailer Demand

- 5.30 Current retailer demand for floorspace within a town centre is an indication of the health of a centre, which has generally been strong over the last decade. Demand for floorspace has decreased over the past three years, although demand is still evident and is particularly strong in comparison and service categories, as illustrated below in Table 5.2. Demand from retailers currently includes Maison Blanc patisserie, The Car Factory, Past Times, Café Rouge, Champneys Forest Mere and Fitness 4 Less. Fall in retailer demand may be in part due to the size of retail units available in Salisbury city centre which may be too small to suit the requirements of modern retailers. It should be noted that some retailers prefer not to register their requirements on this database, and therefore these figures are only indicative.

- 5.31 Whilst the centre does contain a good array of comparison retailers, our site visit did indicate, due to the historic nature of the centre, a lack of modern/larger units in the primary shopping area which may prevent new retailers from choosing Salisbury and for existing retailers to expand their existing operations. This issue should be sought to be addressed through the LDF period.

Table 5.2: Salisbury Retail Demand

Retail Category	No. of Units	Min. Floorspace sqm Gross	Max. Floorspace sqm Gross
Convenience	1	74	121
Comparison	7	423	920
Service	7	2,007	2769
Total	15	2,504	3810

Source: Focus Property Intelligence, August 2010

Pedestrian Flows

- 5.32 According to data recorded by City Centre Management, footfall for the city in 2009 was down each month compared with the data recorded in 2008, with the exception of January 2009 (possibly due to the attraction of the January sales). In contrast, initial data for 2010 recorded a fall in pedestrian numbers in January, but an increase in February compared to the 2009 data. This could be due to the exceptionally cold and icy weather Salisbury experienced in January 2010. Similar to the findings in the Salisbury Retail Study (2007), there has been very little change in the overall popularity of shopping areas. High Street North, Silver Street, The Maltings and High Street South continue to experience the highest levels of footfall. Whilst Fisherton Street (north and south) experience the lowest levels of footfall.

Development Opportunities

- 5.33 A key development site for Salisbury city centre over the forthcoming LDF period is the Maltings and Central Car Park site. This site is close to the heart of the existing retail provision and should complement the existing retail stores in the centre. The Maltings and Central Car Park site is to be re-developed through a retail-led mixed use development. Core Policy 7 of the South Wiltshire Core Strategy Proposed Submission Document (July 2009) states that the site has the capacity for a total of 40,000 sqm (gross external area) of new retail space. It is anticipated that retail deficiencies in

the existing centre will be addressed through the new development which is intended to include a department store, a range of large and smaller shop units, convenience floorspace, leisure uses (15% of comparison floorspace) and the enhancement of the public realm in this area. The Maltings and Central Car Park redevelopment provides the opportunity to address the current weaknesses of the centre such as the current lack of large format retail units. The redevelopment of this site will enhance the vitality and viability of Salisbury's retail offer.

- 5.34 Another potential development opportunity site is the vacant Woolworths store in the High Street. This vacant unit in primary shopping frontage provides a large unit to provide additional retail floorspace, suitable for larger, modern format retailers.

Customer Views and Behaviour

- 5.35 An in-centre survey of 151 shoppers and a household telephone survey were undertaken in June 2010, which included various attitudinal questions on the reasons for choosing to visit Salisbury town centre, frequency of visits and likes/dislikes about the centre (See Appendix 6 for the results). The key findings are summarised below.

- The majority of in-centre shoppers (75%) classed themselves a 'local shopper' whilst a relatively high proportion were tourists (17% stated they were a 'day tripper/visitor' and 2.6% cited they were 'on holiday'). This reflects the importance of tourism to the local economy.
- The majority of people in the in-centre survey (69%) cited that Salisbury is their first choice destination for non-food shopping. Of those who indicated that Salisbury was not their first choice destination competing centres performed strongly, with 30% cited Southampton, 20% cited Bournemouth and 10% cited Bath, Andover, Chippenham and Swindon.
- Trips to the city centre are predominately focused around shopping, more specifically, 40% of shoppers expected to buy 'food and groceries' and 23% buying 'clothes and shoes'. Only 13% stated that their trip was focused around leisure services such as 'food/drink at restaurants/bar/pubs', indicating that these facilities are not a key attractor to the city.
- Leisure facilities, food and drink facilities and tourist attractions in Salisbury failed to perform strongly in the in-centre survey, with the majority of respondents to the in-

centre survey (58%) responding that they 'never' use these facilities. Indeed, only 1% of respondents stated that leisure facilities are what they like about the city. This highlights that Salisbury faces significant competition from neighbouring centres in terms of leisure provision.

- 52% indicated that they liked Salisbury because it is an 'attractive environment/nice place', 21% stated that they liked the 'good range of shops', 18% cited it was 'easily accessible from home'. Interestingly 17% stated they liked Salisbury because it has a 'good range of entertainment /restaurants/public houses', these results and the findings above indicate that despite shoppers liking the range of restaurants, they might not be utilising them often and that the existing provision could be enhanced in order to compete more effectively with other centres.
- The majority of visitors travelled to the centre by car (45%), 24% walked and 21% travelled by bus. The majority of those travelling to Salisbury by car (47%) stated that they did not find the parking charges expensive and 65% did not find it difficult to find a parking space.
- 5% travelled to Salisbury using the park and ride scheme and 4% cycled. Over a quarter of in-centre respondents had used the park and ride scheme and of those who have used the scheme, 90% would use it again, indicating that the scheme has been relatively successful.
- Improvements people want to make to the centre include 15% citing 'improve range of independent/specialist shops', 11.3% citing 'attract larger retailers' and 9% cited reduce cost of parking'. Only 25% cited that an improved higher quality market place that held a range of commercial, cultural and leisure facilities would encourage them to visit Salisbury more often.

Edge / Out-of-Centre Retail Provision

- 5.36 The main concentration of Retail Warehousing in Salisbury is dispersed along Southampton Road to the south east of the City Centre.
- 5.37 Individual retail warehouse units are clustered at certain points along **Southampton Road**. Southampton Road Retail Park and Dolphin Industrial Estate contains a Homebase, Argos Extra, Next, The Carphone Warehouse and Currys as well as a

number of traditional employment units. Dolphin Retail Park has a total retail floorspace of approximately 6,900 sqm GIA.

- 5.38 The Bourne Retail Park located to the east of Dolphin Retail Park is home to three retailers including Staples Wickes and Sturtions and Tappers (furniture retailers). Bourne Retail Park opened in 2000 and has a total floorspace of approximately 5,550 sqm GIA. Bourne Way Retail Park opened in 1992 and is home to two retailers; Carpetright and Dreams. This retail park has a GIA of 1,200 sqm.
- 5.39 On Churchill Way adjacent to the Waitrose supermarket (mentioned below) there are three additional retail warehouse units. These include Sports Direct, Comet and Smyths Toys. Including the Waitrose unit, this retail park has a total GIA of approximately 12,500 sqm.
- 5.40 There are a number of other freestanding retail warehouse stores across Salisbury including Halfords (900 sqm) and Maplin Electronics (650 sqm) on Dairy Meadow Lane, Matalan (2,200 sqm), PC World (1,050 sqm), Pets at Home (1,000 sqm), and B&Q (3,400 sqm) on Southampton Road. There are also a few retail units on Churchfields Industrial Estate for example, Scats Country Stores.
- 5.41 There is an extant planning permission for the development of a further bulky goods retail park, Salisbury Retail Park, on London Road. The application was refused by the Council and then allowed on appeal in 2009. The development will comprise 8 retail units, with 8,361 sqm retail floorspace at ground floor and 4,182 sqm retail floorspace at mezzanine level, which is restricted to sales of bulky goods.
- 5.42 In addition to the Sainsbury's and Tesco in Salisbury City Centre there are two main edge/out-of-town foodstores. **Tesco** on Southampton Road has a sales area of 3,571 sq m (Tesco recently extended). This large out-of-centre Tesco is located to the south east of Salisbury City Centre and is the largest foodstore in Salisbury. The store was granted consent in 1987 (Ref: 87/2026) and opened in 1989. There are no conditions attached to the original consent restricting opening hours, servicing, net/gross floorspace, or the sale of goods. The store has a wide range of retail goods and other services, and is easily accessible on the main road network. It is a popular and busy store, and footfall was strong on the day of the site visit.
- 5.43 In April 2006, consent was granted to extend the Tesco on Southampton Road:

"Extensions and alterations to foodstore, comprising 2,002 sq m gross floor area (1,465 sq m net sales floor area) including internet shopping facility, bulk storage, mezzanine floor cafe, extension of eastern site boundary, alterations to car park layout, landscaping and associated highway works." (Ref: S/2004/1239)

- 5.44 The consent is subject to a number of conditions. Condition 7 states that the net retail floorspace shall be restricted to that shown in the approved plans and no additional retail floorspace shall be created whatsoever, whether by insertion of a mezzanine or otherwise, without written permission of the LPA. Condition 8 states that no more than 20% of the total retail sales area of the whole store, including the retail sales area of the extension permitted, shall be used for the sale of toys, clothing, sports goods, kitchenware, books, CDs, videos, DVD's, electrical goods, furniture and other household goods.
- 5.45 A further planning application relating to the Tesco store on Southampton Road, seeking an increase in floorspace of 1,438 sq m net (Ref: S/2006/1740) was approved in December 2006.
- 5.46 The **Waitrose** store on Churchill Way West comprises a Waitrose 'Home and Food' store and three adjoining non-food retail warehouse units at its western end (discussed further below). Outline planning consent (Ref: S/93/1019/TP) was granted in October 1994 for the construction of a new superstore with Coffee Shop, non-food retail unit (s), petrol filling station, car parking and ancillary service areas and lorry park. Reserved matters (Ref: 96/0944) were granted in August 1996.
- 5.47 The Waitrose store benefits from good access to the road network, located off Churchill Way to the north of Salisbury town centre. In granting consent for the scheme, the Secretary of State accepted the site was edge-of-centre on the basis of potential linked trips with the city centre and that it was within reasonable walking distance of some of the central shopping area of Salisbury. Lying c.750m from the primary shopping area, the Inspector agreed with the edge-of-centre description on the basis of linked trip survey evidence, and that the route is well-used and pleasant.

Summary

- Salisbury is an attractive and historic city, with a high quality environment, and a strong representation of small, specialist shops. It performs a role not only as a

retail destination, but is also a strong tourist and visitor destination, as well as an important employment centre.

- Our analysis identifies a vital and viable town centre; we have, however, identified potential signs of vulnerability and barriers to growth, as well as opportunities to enhance and strengthen the centre over the forthcoming LDF period. The street pattern is complex and extensive, and pedestrian circulation is unlikely to penetrate all quarters, particularly by those who are unfamiliar with the centre. There are a number of key attractors missing, including department stores, and higher order and mainstream retailers which are represented in competing centres such as Southampton. The centre also lacks a good array of modern/large unit sizes which could prevent new retailers from seeking representation in the centre in the future.
- Weaknesses in leisure provision, for example the below average representation of cafes, the high proportion of surveyed shoppers never using leisure provision in Salisbury and the lack of a clear location of evening eating and drinking units, should be addressed over the LDF period in terms of an overall strategy for the area and the promotion of the night time economy. Enhancing leisure provision in Salisbury would enable the city to compete with centres outside of the study area, complementing the existing retail offer of the centre and enhancing the city centre as an evening destination.

Chippenham Town Centre

- 5.48 Chippenham is one of the largest market towns in Wiltshire and is situated 12 miles to the north east of Bath, 25 miles to the east of Bristol and 18 miles to the south west of Swindon. The town benefits from good access to major roads, including the A4 and the A305, which provide direct access to the M4 lying approximately four miles to the north. The core of the town centre is surrounded by the River Avon, and a crossing over the river links the High Street (where the main retail provision is located) to The Bridge and New Road (which also provides retail units and links to Chippenham train station). Chippenham features attractive historic stone buildings.
- 5.49 The Chippenham Vision (2008) document identifies various opportunities to improve the town centre. The main priority actions relating to retail include improving shop fascias and signage; marketing campaigns to encourage occupancy of vacant units

and encourage more shoppers in to the town; opportunity to expand the market size, frequency and variety; to regenerate Emery Gate shopping centre to enhance choice, accessibility and appearance; and to encourage evening town centre use and vibrancy with improved retail, cultural and leisure facilities. The Vision aims to improve the leisure offer by enhancing the riverside environment and promoting a series of riverside events and community leisure facilities.

Accessibility

- 5.50 There are three main car parks in the town centre; Emery Gate, Borough Parade and Bath Road, totalling approximately 640 car parking spaces. Public transport links are also reasonable with a good provision of bus services from outlying towns and villages. Chippenham also has a train station to the north of the town centre on Cocklebury Road, which is on the Great Western line between Wales and London. By rail, trains from Chippenham provide direct links to Swindon, Reading, Bristol Temple Meads, Bath Spa and London Paddington. A bus station located at Timber Street also provides coach connections to centres including Swindon, Heathrow, London, Corsham, Bath and Bristol. Local buses connect Chippenham to the centres of Devizes, Swindon, Malmesbury, Frome, Bath and Bristol

Diversity of Uses

- 5.51 Chippenham's retail offer is focussed around the pedestrianised section of the High Street where the majority of shops are contained within converted buildings. There are two managed shopping centres; Borough Parade and Emery Gate, which are located to the east and west of the High Street respectively. Borough Parade opened in 1996 and comprises approximately 7,700 sq m of retail floorspace with retailers including New Look, WH Smith and Argos. Emery Gate is a covered mall which opened in 1986. It comprises around 9,300 sq m retail floorspace and is anchored by a Tesco Metro (1,683 sq m net) with other retailers including Iceland (391 sq m net), Peacocks, Bon Marche and Dorothy Perkins. Both shopping centres are generally well maintained.

Table 5.3: Chippenham Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	12	116	193	22	343
Percentage of Total (%)	3.5	33.8	56.3	6.4	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-4.16	4.39	21.07	-3.46	N/A

Source: Experian Goad Category Report, August 2009 and Wiltshire County Council Environmental Services Department, September 2008 Survey

- 5.52 Secondary retail areas are located to the north and south of the High Street along The Bridge, New Road, Station Hill, Market Place, The Shambles, The Butts and The Causeway. These areas offer a small range of shops and large variety of services, including florists, furniture shops, estate agents, pubs, hairdressers and betting offices. North of the High Street features a mixture of attractive traditional buildings alongside more modern stores, of which the later are beginning to appear dated.
- 5.53 As outlined in Table 5.3 above, data taken from the Wiltshire Council's most recent survey of Chippenham in September 2008 indicates there are 128 convenience and comparison units comprising 18,341 sq m retail floorspace which equate to 12 convenience units (3,262 sq m) and 116 comparison units (15,079 sq m).

Convenience

- 5.54 The largest foodstore in the centre is the Tesco Metro at Emery Gate (1,683 sqm net). Parking is accessed for Emery Gate at the rear of the centre, either via Emery Lane or the Town Bridge. The store provides a world foods product range and a hot chicken counter. The supermarket opened in 2008, replacing the former Somerfields store. In addition to the Tesco Metro there is a One Stop convenience store at Market Place.
- 5.55 The number of convenience retail units is 4.16% below the national average. The Experian Goad category report (2010) indicates there are a good representation of bakers and convenience stores in the town centre but below average representation of supermarkets, and no representation in the centre of traditional food retailers such as butchers, fishmongers, grocers and delicatessens. Main convenience provision is located outside of Chippenham town centre and this is discussed further below.

Comparison

- 5.56 Comparison retail provision in Chippenham is relatively strong, and provides an above average number of comparison units (4.39%). As well as the two managed shopping centres mentioned previously, there are a number of comparison units within the centre. At Market Place and High Street multiple retailers include Burtons, Millets, Stead and Simpson, Poundland, Wilkinson and WHSmith. At The Bridge and New Road units include La Senza, Oxfam and Allied Carpets. Overall, Chippenham has good representation of national multiple retailers for a centre of its size including Tesco Metro, Iceland, Starbucks, New Look, Waterstones, Wilkinsons, Dorothy Perkins, Boots, Pizza Express and Argos. Chippenham also has a good representation of independent retailers, which contribute to the overall offer of the town.
- 5.57 Analysing retail composition more closely, there is an above average representation of menswear and ladieswear, furniture, telephone and toiletries and cosmetics shops, but a below average representation of chemists, jewellery and antique shops.
- 5.58 Chippenham's retail offer is complemented by a weekly market held every Friday and Saturday on the Buttercross Market Square.

Service and Leisure Uses

- 5.59 There are 193 service units including estate agents, cafés, takeaways, banks and building societies and a range of other uses including office premises, pubs and hotels. Service units represent 56% of the total number of retail and service units in Chippenham. Service operators are generally located at The Causeway, Market Place and the northern half of New Road. These are more secondary retail locations, well suited to accommodating service uses.
- 5.60 There is a particularly strong representation of financial and business services clustered around the southern end of High Street and Market Place. There is a slight under representation of bars and restaurants in the centre and it is considered that the town's evening economy offer is weak and that the town centre is fairly quiet and uninviting after the shops close.
- 5.61 Within Chippenham there is also a museum and heritage centre, a library and the Olympiad Leisure Centre which provide an additional attraction to the centre. The

leisure offer of the town centre is somewhat limited, with no clear area catering specifically for leisure. The Reel / Astoria Cinema at Chippenham does enhance the leisure offer of the centre, although the cinema is located in an out of centre location to the north west of New Road.

Vacancies

- 5.62 Vacancy levels in Chippenham have been historically low and shops have been filled relatively quickly. More recently, vacancy levels have increased which is partly due to a number of recent retailers going into administration including Woolworths, although the town has by no means been as badly hit as other towns. At the time of the Council's most recent survey there were 11 vacant retail units and 11 vacant service units. During our site visit in 2010 the former Woolworths unit was still vacant.

Environmental Quality

- 5.63 The pedestrianised High Street creates a safe and attractive environment for shoppers and visitors and the High Street benefits from market town architecture and period features. Shop fronts vary in design and those on the edge of the centre look poorly maintained and in need of general repair and upkeep. It would appear that there has not been a co-ordinated approach in trying to adopt a uniform design policy and such policy should be encouraged. The presence of the River Avon (Bristol Avon) also provides an attractive riverside setting, although it is considered that this could be further exploited. The Station Hill area could also be made more attractive linking the town centre with the railway station.

Commercial Performance

- 5.64 Rental levels in Chippenham were £592 per sq m in 2009 and have dropped by 21% since 2008 when they were £753 per sq m and had been stable at this level since 2006. Although this appears quite a dramatic fall, this is similar to the situation in many towns across the UK, which have struggled in the recent economic downturn. Valuation Office data highlights that retail property yields have gradually fallen from 8% in January 2005 to 7% in July 2008 indicating increasing investor confidence in Chippenham town centre.

Retailer Demand

5.65 There is a good level of demand from operators seeking premises in Chippenham and we understand from local agents that there is retailer interest in the town but a shortage of modern units to meet demand. The Focus database has ten requirements from retailers looking to locate in Chippenham including one convenience retailer (Holland and Barrett), two service retailers (Cafe Nero and another coffee shop) and seven comparison retailers (The Works, Desire by Debenhams, TK Maxx, Dr China, Phones 4 U, Phase Eight and Nokia). Whilst many of these retailers may not be in a position to progress matters in the current economic climate, it is expected that these requirements will become live again in the future.

Development Opportunities

5.66 A number of sites have been identified for retail development by previous retail studies (Roger Tym's North Wiltshire Retail Needs Assessment Study September 2007 and Savills Chippenham Retail and Commercial Healthcheck Report, March 2009). The **Bath Road Car Park / Bridge Centre** site is considered to offer a natural extension to the High Street and could provide a supermarket, as well as larger sized units. The **Borough Road Car Park** offers an opportunity to provide infill development at the rear of the Borough Parade Shopping Centre. The **Bus Station and Library** in Timber Street and the **Post Office Sorting Depot** also provide opportunities to regenerate and extend the town centre. The site currently occupied by Superdrug is also considered to offer the potential to create a new development with riverside frontage with retail and leisure facilities. Many, but not all of these sites are owned by Wiltshire Council which would ease the development process.

Customer Views and Behaviour

5.67 An in-centre survey of 149 shoppers and a telephone survey was undertaken in June 2010, which included various attitudinal questions on the reasons for choosing to visit Chippenham town centre, frequency of visits and likes/dislikes about the centre (see Appendix 6 for the results). The key findings are summarised below.

- 79% of visitors classed themselves as a 'local shopper' whilst 13% were a 'day tripper/visitor' and 7% a 'town/city centre worker'. Reflecting the proportion of local shoppers, 71% cited 'close to home/live here' as the reason for visiting Chippenham over other competing centres. 'Close to work' was cited by 9% whilst 'good range of shops/services' was cited by just 3%. This indicates the main

function of the town is shopping for local residents, although tourism does play a role in the economy.

- The majority (34%) cited 'non-food shopping' as the main purpose of their visit to Chippenham. 19% cited 'food shopping', 10% stated 'financial services' and 10% cited 'work/business'. This reflects the strong representation of non-food shopping (comparison retailing) in the town, and the below average representation of food shopping (convenience retailing) and indicates that there is an opportunity to increase convenience provision in the town.
- Only 36% of visitors cited Chippenham as their first choice destination for clothing, footwear and other non-food shopping. Of those who do not cite Chippenham as their first choice, the most popular destinations for non-food shopping were the competing centres of Bath (41%) and Swindon (16%).
- The majority (34%) of shoppers visit Chippenham for shopping 'once a week'. 38% of visitors use the services in Chippenham 'once a week'. The majority of visitors (70%, 34% and 89%) 'never' use leisure facilities, food and drink facilities or tourist attractions, respectively, in Chippenham. This suggests that there is scope to enhance leisure provision in the town, concurrent with our earlier findings of an under representation of restaurants and bars in Chippenham.
- 21% cited that they liked Chippenham because it is 'easily accessible from home' and 20% stated that it has an 'attractive environment/is a nice place'. The majority (43%) cited that there was 'nothing/very little' to dislike about Chippenham. Suggestions for improvements to the town include 'attract larger retailers' (26%), 'range of specialist and independent shops' (24%) and 'provide more leisure facilities' (including cinema, restaurants/sports and fitness) (5%).
- The majority of visitors travelled to the centre by car (48%), 32% walked and 16% travelled by bus. Just 2% cycled to the centre. Of those that drove to Chippenham 19% used the 'Emery Gate' car park and 13% used 'Borough Parade'. The majority (50%) cited that the parking charges were not too expensive and 58% cited that they had no difficulties in finding a parking space.
- The majority of visitors (83%) travelled 20 minutes or less to get to Chippenham centre whilst 13% travelled between 20-45 minutes. This highlights the role of the town as providing local shops and services.

- Respondent's views on potential improvements were concentrated on the retail provision of the centre with people citing the need to attract larger retailers (25.5%), improve the range of independent, specialist shops (24.2%) and choice of multiple retailers (11.4%). 4.7% of respondents also identified the need to provide more leisure facilities (such as cinema, restaurants and sports and fitness facilities).

Edge / Out of Centre Retail Provision

- 5.68 In Chippenham convenience retail provision is dominated by out of centre provision of large supermarkets, including Sainsbury's on Bath Road (4,908 sq m sales area) approximately 1.5 miles to the south west of the centre and Morrison's on West Cepen Way (2,508 sq m sales area) 1.5 miles to the north of the town centre. Both appeared busy and to be trading well on the day of the site visit, particularly the Sainsbury's.
- 5.69 The **Hathaway Retail Park** lies adjacent to the town centre and is located to the north of North Road along Foundry Lane, close to the railway station. The retail park opened in 1992 and has a total floorspace of 7,292 sq m, with open A1 planning consent. Retailers on the park include Tesco Express, Homebase, Bathstore, Halfords, Dreams, Laura Ashley, Blockbuster and Sally Hair and Beauty. The area to the north of the High Street is separated from the core retail area by a bridge over the River Avon although there appears to be a degree of synergy and linked trips between the two areas, aided by the presence of the Bath Road car park to the north of the river.
- 5.70 There are a cluster of retail warehouse units along **Bath Road**, to the south west of Chippenham town centre. Units include Currys, Carpetright, B&Q and Focus, with a total net floorspace of 9,384 sq m. The retail warehouse development opened in 2004.
- 5.71 **Chippenham Retail Park** is also located out-of-centre, on the western edge of Chippenham, off Bumpers Way. The retail park is currently occupied by Wickes, Pets at Home and Comet and has a total floorspace of 2,995 sq m. Chippenham Retail Park opened in 2007.
- 5.72 In terms of out-of-centre foodstores there are two main convenience stores. **Morrisons** at Cepen Park North is the smaller of the two with a net floorspace of 4,101 sq m. The supermarket is situated at the north of Chippenham and opened in 1995. The larger

foodstore is the **Sainsbury's** at Cepen Park South which opened in 1990. The supermarket has a net floorspace of 5,050 sq m.

Summary

- Chippenham, with a reasonable mix of mainstream multiple retailers, is performing well in the face of strong competition from the higher order centres of Bath and Swindon and is considered to be vital and viable. We consider the priority for Chippenham over the LDF period should be to encourage its local population to use the town centre more frequently as their preferred shopping destination and to provide retail units of sufficient size and configuration to accommodate retailers who are seeking larger units.
- It is also considered that improvements could be made to the street scene and general environment to make Chippenham a more attractive place to shop. The addition of good quality cafés and restaurants with outdoor seating areas would add to the vibrancy of the centre, increase dwell time and encourage shoppers to visit Chippenham to use food and drink units. Our review of the centre also identified a lack of restaurant/cafe offer in the centre. Improvements in this area would help to attract people into the centre beyond the core hours of 'nine to five' and to create an inclusive evening economy.

Trowbridge

- 5.73 Trowbridge is located in the west of the county on the River Biss, approximately 12 miles south east of Bath. The town's railway station is situated on the Wessex main line linking the town with Bath, Bristol, Salisbury, Southampton, Portsmouth and Chippenham and the wider rail network including Cardiff. The town centre contains good examples of architecture, such as the Town Hall and many buildings associated with the historic textiles industry, much of which has now left the town.
- 5.74 The town centre is compact with the focus for shopping in the town located at Fore Street and Market Street; the more modern Shires and Castle Place shopping centres complement the town centre's offer. However, several elements of edge-of and out-of-centre retailing have developed in recent years (including the Shires Gateway and the new Sainsbury's at Conigre), which have dispersed the town's retail circuit.

- 5.75 The Shires Gateway development is located in the west of the centre immediately opposite the main entrance to the Shires Shopping Centre and the Asda superstore. The development includes over 7,000sq m of Open A1 retail use, with the majority of this provided in large retail units fronting Bythesea Road.

Accessibility

- 5.76 Trowbridge is easily accessible by a range of transport methods, including easy access via public transport methods. The town's train station is situated just to the north of the town centre, linking the town with Wessex Main Line, and providing car parking for a large number of vehicles. Buses operate around the town centre, with a large number of bus stands located at Market Street with services running to Frome, Chippenham, Melksham, Bath, Warminster, Bradford-on-Avon and Westbury.
- 5.77 The main car park serving the town, with the exception of the parking provided at the railway station, is provided to the west of the Shires Shopping Centre, adjacent to the Asda store, which has capacity for c.700 vehicles. When considered with other areas of car parking around the town, such as the multi-storey car park to the south of Castle Place Shopping Centre and the areas of parking provided adjacent to foodstores i.e. Sainsbury's, it is apparent the town has sufficient areas of car parking.

Diversity of Uses

- 5.78 The most recent centre survey for Trowbridge town centre by Wiltshire Council took place in November 2008. The survey found that Trowbridge contains a strong mix of comparison, convenience retail and service uses (see table 5.4 below). There are 16 convenience retail units within the town centre, representing 5% of the total town centre units. A significant proportion of the town centre units are comparison retail units, totalling 107 of the 348 retail units in the town centre, which equates to 31% of the total town centre units. Service units represent 54% of the total town centre units.

Table 5.4: Trowbridge Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	16	107	188	37	348
Percentage of Total (%)	4.59	30.74	54.02	10.63	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-3.07	+1.33	+18.79	+0.77	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, November 2008 Survey.

Convenience

- 5.79 Several major food retailers are located on the edge of the town centre, which are relatively new additions to the town's retail offer.
- 5.80 The newest of these food stores is the Sainsbury's store accessed from Conigre to the north of the town centre, which opened in 2010 and has a net sales and display floorspace of approximately 2,900 sqm. The delivery of the store also accompanied new residential development, which is well integrated with the new store.
- 5.81 The Asda store, which is linked to The Shires Shopping Centre, occupies a large site at the west of the town centre close to the railway station. Asda opened in 1994 and provides 2,330 sqm of retail sales area, around 10% of which is involved in the sale of comparison goods such as small household electrical appliances, CDs, DVDs, books and clothing. The Asda has several counters within the store, such as the rotisserie, an ethnic foods section, deli counter, pizza and bakery counters as well as providing Halal products and appeared busy on the day of the site visit befitting from its position as a key gateway into the town centre. The Tesco, Lidl and Aldi stores are situated in out-of-centre locations and are discussed in more detail at the end of this section.
- 5.82 The town's convenience offer is not limited to the larger retailers on the edge of the town centre. There is a good range of independent convenience retailers within the town centre, including greengrocers and butchers. An Iceland store situated within the Shires Shopping Centre recently opened and occupies a previously vacant unit providing 1,000 sq m gross floorspace within the Shires Centre.

Comparison

-
- 5.83 Trowbridge offers a good range and quantum of comparison retailers. The HJ Knees department store provides a range of goods over three floors including household electrical appliances, DIY, home furnishings, gifts, lighting, kitchenware, jewellery, luggage, loungeware, carpets and rugs and also provides a hair salon service on the second floor. The department store lies within the Fore Street pedestrianised area of the town, within a concentration of comparison and service uses in this area, and is accessed from both Fore Street and Castle Street. Other areas of strong comparison retail offer are within the Shires Shopping Centre and on Market / Silver Street. The Castle Place Shopping Centre provides a limited comparison retail range, although the centre does contain the Wilkinsons store providing garden, home furnishings, lighting, kitchen, leisure and outdoor, DIY, pet and health and beauty products.
- 5.84 A multiple retailer is defined as being part of a network of nine or more outlets and their presence can enhance the appeal of a centre. Trowbridge has a significant number of multiple retailers, which would be expected for a centre of Trowbridge's status within the sub-region. Multiple retailers in Trowbridge include WH Smith, Argos, Boots, Monsoon and Waterstones. In addition to these key attractors, Trowbridge also has strong representation from independent retailers, recognising Trowbridge's ability to attract niche and quality retailers as well as mainstream high street retailers.
- 5.85 There are a number of homewares, electrical, DIY, furnishings and floorings retailers within the town centre, several of which are located on Silver Street and Church Street. In addition, as mentioned above, HJ Knees department store has a strong homewares, furnishings, floorings and DIY offer, and when considered alongside other similar stores around the town it is clear that Trowbridge has a strong representation in this sector. Other strong sectors include electricals, sport and leisure, books and stationery, and ladieswear.
- 5.86 Indicative of a wider national trend, as a result of the economic recession, is an increase in the proportion of charity stores within most centres. This trend is continued within Trowbridge, which contains a number of such stores, which are dotted around the town centre.

Service and Leisure Uses

- 5.87 Within the secondary areas of retail, observed to comprise Fore Street (west) / Wicker Hill, Silver Street, Castle Street, Stallard Street, Manvers Street and Church Walk / Street,
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there is a good representation of retail service uses. In particular, the Church Walk / Street area provides a good range of hair and beauty and travel agents, and the Fore Street (West) part of the town centre provides financial and business services. These service uses are present throughout the town centre, which complement other retail uses within the town.

- 5.88 Similarly to the other major strategic centres of Salisbury and Chippenham, Trowbridge also has a higher than average proportion of service units, equating to 54% of the total number of units. Trowbridge has a particularly high proportion of retail and financial and business services such as health and beauty salons, opticians, estate agents, legal services, employment/careers centres and travel agents.
- 5.89 With regard to leisure services, Trowbridge has a below average representation of restaurants, pubs, and cafes. Trowbridge does benefit from other leisure uses, such as the Arc Theatre, which also provides a cinema, which is located out-of-centre, to the south of Trowbridge. Telephone survey results indicate that Trowbridge is the third most popular centre in Wiltshire (behind Salisbury and Chippenham) for evening eating and drinking, although the town performed poorly in comparison to centres outside of the study area such as Bath and Swindon.
- 5.90 An element of concern within Trowbridge are some of the leisure services within the retail core, such as the fast food outlets Dominos takeaway and Chicken and Ribs takeaway at Castle /Market Street, although this area is not currently designated as primary shopping frontage. When considered together, pubs, cafes / takeaways and restaurant account for 14% of the town centre units, several of which are situated within the retail core.

Vacancies

- 5.91 There are a number of vacancies dispersed through the town, some of which appear to have been vacant for some time. A degree of vacancy among retail units is a normal part of a well functioning town centre and on average c.10% of all units will be vacant. The failure to let empty shops, however, leads to periods of prolonged vacancy which negatively affects the character of an area. Blank facades, permanently drawn shutters and boarded up shops remove active street frontages and can attract fly-posting, litter, vandalism and fall into disrepair, which can harbour anti-social activity and in extreme cases create no-go areas and urban blight.

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- 5.92 The November 2008 Wiltshire Council survey found that Trowbridge has 37 vacant units, representing 11% of all town centre retail units, which is broadly consistent with a healthy level of vacancies. There are clear signs that several vacant units are the subject of refurbishment to ready them for re-occupation, providing an encouraging indication that the vacancies within some areas of Trowbridge are experiencing an organic improvement following the recession.
- 5.93 Fluctuations in footfall may also affect the viability of units as rents/business rates may be too high to allow a shop or business to trade viably. The negative impact of a vacant unit on the surrounding area may encourage other vacancies nearby, in units that are also struggling to reconcile their rents with lower levels of passing trade, which can produce further reductions in pedestrian activity.
- 5.94 The lower level of Castle Place Shopping Centre had a significant number of vacant stalls, focused around those areas that did not benefit from regular footfall, which have not been counted within the vacancy statistics. The remainder of the lower ground were observed to be quiet at the time of the survey, whilst other areas of the town centre benefited from significant levels of passing footfall and appeared busy.
- 5.95 Concentrations of vacant uses are also found within secondary areas of the town centre; in particular the Fore Street, Church Street, Silver Street and Bythesea Road areas have several vacancies within them, some of which are long-term vacancies.

Environmental Quality

- 5.96 There is a range of public space throughout Trowbridge including; pedestrianised areas, with well kept street environments and limited noise and pollution; small pockets of formal open space, which are limited within the town centre; and covered shopping areas at Castle Place and Shires shopping centre which are very well maintained and a safe, providing a clean environment within which to shop.
- 5.97 There are problems with legibility, especially between different areas of the town. The Shires Shopping Centre is easily accessible by car, but pedestrian movement to and from the shopping centre to the old town are restricted and poorly signposted. This may restrict linked trips between these different areas. The development of The Shires Gateway to the west of The Shires Shopping Centre may also impact on the poor legibility between modern retail developments in the centre through to the old town.
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- 5.98 Generally the town centre is clean, quiet and safe, but in areas of concentrated vehicular traffic such as the north western elements of the town it can be noisy at peak times.

Commercial Performance

- 5.99 Trowbridge has benefited from recent developments and investment in the town centre, which is clear considering that over the past few years, the town centre has improved its position within the Javelin Venuescore retail rankings from 320th in 2007 to 271st at 2009. The level of rent which retailers are prepared to pay for retail space within a centre is a useful indication of the perceived strength of a centre (although factors such as the supply of floorspace have an impact on rental value). Whilst town centre rental values have fallen from their 2008 value at £700 per sq m to £646 at 2009, this is an understandable fall, which is most likely attributable to the wider economic recession.

Retailer Demand

- 5.100 Current retailer demand for floorspace within the town centre is an indication of the health of a town centre, which has been strong in Trowbridge over the past decade. Demand has fallen slightly over the past three years, although demand is still evident, particularly in the comparison sector as illustrated at Table 5.5 below. Notably there are no current registered requirements from convenience retailers, although these statistics are not a comprehensive guide of all requirements as some retailers prefer not to register interests on this database.

Table 5.5: Retailer Demand

Retail Category	No. of Units	Min. Floorspace sqm Gross	Max. Floorspace sqm Gross
Comparison	6	3,679	7,544
Convenience	0	0	0
Service	1	74	139
Total	7	6,350	7,683

Source: Focus Property Intelligence, July 2010

Development Opportunities

- 5.101 A number of brownfield sites have been the subject of developer interest over recent years; prominent examples of which include the former Ushers bottling plant to the

north of the town centre, which has now been redeveloped to provide a new Sainsbury's store and residential development (ref. W/09/01115/REM).

- 5.102 A site between the railway station and the Shires Shopping Centre at Bythesea Road (The Shires Gateway) has recently been developed by Parkridge to provide new retail units to the west of Asda, although only half of these units are currently let. This redevelopment was intended to link with a new Waitrose store to the south of the new units; however Waitrose are understood to have pulled-out of this venture for unknown reasons and the southern element of the site is now cleared, and potentially represents a development opportunity. The relocation of the Tesco store from St Stephens Place to the south of the Castle Place Shopping Centre to a site south of County Way ring-road left a vacant site, which remains a significant long-term vacant development opportunity. In the event that the St Stephens Place site is redeveloped, then depending on the uses delivered on this site, there may be an opportunity to create linkages to Castle Place and increase footfall in this area.
- 5.103 Another potential development opportunity is situated between Fore Street and Church Street, which is largely fenced off, with the exception of a small, relatively new single storey retail unit. The element of the site fronting Church Street currently provides car parking for private premises, which appears to be an inefficient use of town centre land in this location.

Customer Views and Behaviour

- 5.104 An in-centre survey of 150 shoppers was undertaken in June 2010, which included various attitudinal questions on the reasons for choosing to visit Trowbridge town centre, frequency of visits and likes/dislikes about the centre (See appendix 6 for the results). The key findings are summarised below:
- 84% of respondents classed themselves a 'local shopper' and 11% cited they were a 'day tripper/visitor'. In comparison to the centres of Salisbury and Chippenham there were a lower amount of tourists in the centre with only 3% citing they were 'on holiday'.
 - 21% of people stated that 'browsing' was their main purpose of visit, 18% cited that 'financial services' was their main purpose, whilst 14% stated 'food shopping

and 13% cited 'non-food shopping'. These results confirm that service provision dominates the town centre and the retail offer of Trowbridge could be enhanced.

- The majority of people (60%) cited that Trowbridge is their first choice destination for non-food shopping. Of those who cited Trowbridge was not their first choice destination, 60% cited Bath and 20% cited Southampton. Bath is in close proximity to Trowbridge (20 minutes drive) and therefore we would expect the town to provide strong competition, however Southampton is approximately an hour and a half drive from Trowbridge, indicating the strength of the retail offer of the city.
- The majority of visitors (78%) travelled for 20 minutes or less to get to Trowbridge centre whilst 19% travelled between 21-45 minutes. This suggests that the majority of shoppers in the town are local, and while 20% cite Southampton as their first choice destination, the close proximity to Trowbridge attracts shoppers to the town. Indeed, 69% of shoppers cited they chose to come to Trowbridge because it is 'close to home' or the 'live here'.
- The majority (45%) of shoppers expected to buy 'nothing' during their visit to Trowbridge. 21% expected to buy 'clothes and shoes' and 20% cited 'food and groceries'.
- The majority (30%) of shoppers visit Trowbridge for shopping '2-3 days a week'. 36% of visitors use the services in Trowbridge 'once a week'. Similarly to other Wiltshire centres, the majority of visitors (64%, 35% and 77%) 'never' use leisure facilities, food and drink facilities or tourist attractions, respectively, in Trowbridge.
- Respondents liked the 'good range of shops' (29%), that the town is 'easily accessible from home' (17%) and that it is 'easy to park' (7%).
- The main improvements people want to make to Trowbridge include 23% saying that more leisure facilities should be provided, 17% considered that the town needed to 'attract larger retailers', 14% cited that the centre needed a new 'cinema' and 11% said 'clean shopping streets'. In the telephone survey, 7% of respondents who visit Trowbridge at least twice a year believe that the provision of more leisure facilities would encourage them to visit the centre more often, further indicating that shoppers want leisure facilities in Trowbridge need to be improved.

Edge/Out-of-Centre Retail Provision

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- 5.105 The largest out-of-centre convenience retail unit is the **Tesco** store situated on the southern side of County Way (A361). The store opened in 1993 following the relocation of the store from the previous site at St Stephens Way. The store provides a sales area of 6,033 sq m, some of which is provided at mezzanine level, representing the largest foodstore in the Trowbridge area with extensive car parking provision.
- 5.106 **Aldi** foodstore is situated adjacent to the Spitfire Retail Park on Bradley Road and provides a net floorspace of approximately 763 sq m. The foodstore is located in the south of Trowbridge. A **Lidl** foodstore is also located in an out-of-centre location, however it is situated in the north of the town on Canal Road. The Lidl store has a floorspace of approximately 1,097 sq m net and benefits from its own customer car park.
- 5.107 In addition to the Tesco store at County Way, the **Spitfire Retail Park**, located off Bradley Road contains a Currys, Carpetright, Pets at Home, Harveys, Bensons for Beds, a vacant unit and a McDonald's unit. The retail park is a modern development that opened in 1997 and provides a range of retail units from 741 sq m gross floorspace to 1,214 sq m and is well maintained and clean with significant areas of car parking. The Spitfire Retail Park has a total floorspace of approximately 4,900 sq m.
- 5.108 The Spitfire Retail Park sits adjacent to the **Trowbridge Retail Park** that provides a Focus DIY and Garden Centre, Dreams and two vacant units (previously MFI and Right Price Tiles). Trowbridge Retail Park opened in 1989 and has a total of approximately 6,650 sq m floorspace. We understand that Matalan is due to start trading from one of the vacant units in Spring 2011.
- 5.109 In addition, there are also B&Q and Halfords retail units provided in close proximity on Bradley Road. The B&Q has an approximate floorspace of 2,750 sqm and Halfords has an approximate floorspace of 1,150 sqm. All retail units are in a good state of maintenance and all seemed reasonably busy at the time of survey.

Summary

- The centre of Trowbridge is of a similar scale to Chippenham and has a compact town centre with two managed shopping centres; The Shires and Castle Place. The two shopping centres and pedestrianised areas of the centre provide an attractive environment for shoppers. There is a strong mix of comparison,

convenience and service uses and only a slightly above average number of vacant units. The provision of Asda supermarkets in the town centre strengthens the retail offer, whilst the out of centre convenience offer is fairly extensive with the recent opening of Sainsbury's to the north of the centre and the existing Tesco on County Way. The convenience offer of the town is also complemented by out of town discount food operators Aldi and Lidl.

- Vacant units are dispersed across the centre and there are several brownfield development sites across the town which offer further development opportunities including the existing vacant St Stephen's place site adjacent to Castle Place shopping centre. Survey results indicate that shoppers consider that more leisure services need to be provided in the town.

Market Towns

Amesbury

5.110 Amesbury town centre is situated to the east of Wiltshire, approximately 8 miles north of Salisbury and 19 miles east of Warminster. The World Heritage Site of Stonehenge is only two miles to the west of Amesbury. The development of Solstice Business Park to the north of the town has brought economic and population growth to the area. Amesbury town centre has a more modern appearance than many of the towns in the south east of the district with a number of relatively modern, purpose built retail units on Salisbury Street, and the development of a new Co-op foodstore. The town centre is arranged around three streets, the High Street, Salisbury Street and The Centre/Stonehenge Walk. Salisbury Street is the dominant shopping street and is designated as a Primary retail frontage area, which provides a mixture of retail and service units.

Accessibility

5.111 Amesbury is easily accessible by car because the town is located on a major arterial route, the A303, linking the West Country to London and the A345 linking the town with Salisbury. Free on street parking is available for up to an hour on Salisbury Street, Flower Lane and the High Street. Parking for shoppers is also available for approximately 120 shoppers at the Co-Op supermarket on Salisbury Street, 20 parking spaces are available on the north of Salisbury Street and approximately 100 spaces

on the large car park off the A345, The Centre. There is a bus station located on the corner of Salisbury Street and Salisbury Road which provides half hourly buses to Salisbury, Andover and Pewsey. The town's railway station closed in the 1950s and now the closest train stations to Amesbury are in Salisbury or Andover.

Diversity of Uses

- 5.112 The most recent Wiltshire Council survey (December 2007) found the town centre comprises 115 retail and service units, with a total of approx 5,675 sq m comparison and convenience floorspace across a range of different unit types (Table 5.6 below). Service units dominate the town centre offer, and 68 of the town centre units comprise retailing services (such as property services, building societies, opticians and pubs), which represent over half of the total units in the town centre. Comparison retail represents 23.48% of total units, which is 5.93% below the national average. Convenience retail is represented by 8 units, only slightly below the national average.

Table 5.6: Amesbury Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	8	27	68	12	115
Percentage of Total (%)	6.96	23.48	59.13	10.43	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-0.7	-5.93	23.9	0.57	N/A

Source: Experian Goad Category Report, August 2009 and Wiltshire County Council Environmental Services Department, December 2007 Survey

- 5.113 Since the previous Salisbury Retail Study (2006) was undertaken, the centre has seen the development of the extended Co-op in the town centre behind the main shopping area of Salisbury Street, which opened in 2007 and the opening of the Lidl store to the north east of the town centre. More significantly, planning permission has been granted at appeal for a new out of centre Tesco on London Road to the north east of the town which will have a sales floorspace 3,110 sq m net (1,950 sq m convenience with 1,160 sq m of comparison floorspace). This is due to open in November 2010. This likely to alter shopping patterns within the centre with a degree of trade diversion from town centre provision to this out of centre store.

- 5.114 With regard to other convenience offer, there is a small One Stop shop located at the Arcade (a small parade of shops along Earls Court Road) with a sales area of 181 sq m. There is also a bakers, a butchers, two CTNs and a greengrocers. Our site visit in 2010 identified that the off license, Threshers, has closed down and is now vacant.
- 5.115 Representation of comparison units is below average in the town centre. On closer analysis there is a low representation of ladies and menswear clothing, jewellery and telephone shops. Our site visit in August 2010 confirmed with the Wiltshire Council 2007 survey that there are only two clothing stores in the town. Furniture and household retailers and second hand goods and books stores have an above average representation in the town centre.
- 5.116 There is an above average representation of hotels and property service units in Amesbury and a low representation of financial services. The presence of several fast food takeaways and pubs, particularly in Abbey Square, Church Street and the south side of Salisbury Street account for the high percentage of service units. These uses are less desirable on high streets than the currently under represented uses of cafes and restaurants. The cluster of fast food takeaway units at Abbey Square have a poor appearance due to low quality of streetscaping and a large amount of paving.
- 5.117 Key retail attractors in the town include Boots, Lloyds TSB, Vision Express, HSBC and Reeves the Baker. The retail composition in Amesbury indicates that the centre performs as a local shopping area for convenience goods and service needs. We would not expect a town of this size to provide a complete range of comparison retail units, however the low representation of clothing stores, and other comparison stores means that residents have to travel by car or bus to larger towns and cities such as Salisbury and Andover for the majority of their comparison goods needs.

Vacancies

- 5.118 The Council's survey (December 2007) indicates there are 12 vacant units in Amesbury. Our recent site visit identified only 10 vacant units. Several previously vacant units have become occupied by small retailers such as a dentist, hairdressers and a flooring shop. The vacant garage shop on Stonehenge Walk is now a Mace convenience store and the former motor cycle shop nearby has now been sold.

5.119 Vacant units are clustered on the top eastern side of the High Street and Salisbury Street. A large, modern retail unit (1,690 sq m) is currently vacant on Salisbury Street (the former Co-op store). The unit has been vacant since 2009 and has boarded windows and doors, creating an unattractive environment. Boots has relocated to a location adjacent to the Doctors Surgery in the north of the town centre. The Kings Arms public house on Church Street is now vacant.

Town Centre Environment

5.120 Environmental quality in Amesbury is generally good and there are a number of attractive and historic buildings along Church Street and the High Street. There are modern retail units along Salisbury Street and the Arcade at Earls Court Road which are less attractive than the historic areas of the town. Recent pavement widening works have improved accessibility along Salisbury Street, although there are few seating areas. The environment is well maintained and there is little sign of litter or graffiti throughout the centre.

Edge/Out-of-Centre Retail Provision

5.121 Outside of Amesbury centre is a Somerfield convenience store at the petrol station at Solstice Park to the north of the town.

5.122 Recently there has been an increase in convenience store provision in out-of-centre locations. In December 2008 a **Lidl** foodstore opened in an out of centre location on London Road with a net area of 1,063 sq m. A further foodstore has also been developed on London Road. The **Tesco** store on London Road was granted at appeal and has a gross floorspace of 5,564 sq m. The store opened in November 2010.

Summary

- Amesbury has a well below average number of comparison units, with a poor representation clothing stores. The majority of units are for service provision, including a high number of hotels and pubs with hotels. Vacancy rates are also above average, and some of these are dominant units on main streets. Recently works to widen pavements in the area around the new Co-op have improved the quality of the town centre and the environment is well maintained. Improvements

to improve the mix of retail and service units in the centre should be a priority. The effect of the recently opened (out of centre) Tesco to the north of centre on London Road will need to be carefully monitored going forward.

Bradford-on-Avon

- 5.123 The town is characterised by an irregular historic street form, uneven topography, the River Avon's route through the centre of the town, and small retail units focused to the northern side of the town.
- 5.124 The town benefits from a strong tourist economy built around its Roman heritage, complemented by historic structures from various periods dotted around the town enhanced by the unorganised, irregular streets providing a unique setting for the town's historic features. Key attractors to the town include the Tithe Barn, Pack Horse Bridge, the Saxon church, the Catholic church and the Hall; all of which are within easy walking distance of the town centre.

Accessibility

- 5.125 Bradford-on-Avon is located between Bath and Trowbridge on the A363 and benefits from rail connections to Bath, Bristol, Portsmouth, Salisbury, Southampton and Trowbridge. The town centre has very limited car parking provision, and as a result of the nature of the street form, there is little opportunity for on-street parking.
- 5.126 The Shambles and Kingston Road are typical of the narrow lanes with small retail units, separated by only a few metres in some locations and representative of the old historic street pattern. Areas within the town centre limit pedestrian movement, with some pinch points having just one narrow pavement requiring single-file movement at times. These are not broadly representative of the wider town centre, which is a quiet and pleasant place to shop and interact.

Diversity of Uses

- 5.127 The Wiltshire Council April 2008 survey of the town centre found that Bradford-on-Avon comprises 130 retail and service units across a range of unit types, many of which are small units as a result of the traditional street pattern (illustrated in table 5.7 below). Comparison retail provides a strong town centre offer, with 38 of the town centre units retailing comparison goods, which represents 29% of total units in the

town centre. Convenience retail constitutes just 6% of total units, and service uses dominate the town centre with 55% of total units within the centre.

Table 5.7: Bradford-on-Avon Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	8	38	71	13	130
Percentage of Total (%)	6.15	29.23	54.62	10	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-1.51	+0.18	+19.39	+0.14	N/A

Source: Experian Goad Category Report, August 2009 and Wiltshire County Council Environmental Services Department, April 2008 Survey

- 5.128 The tourism economy complements the town's very good comparison and retail leisure economy with several cafes catering for tourist trade. Furniture and household retailers comprise a large proportion of the comparison retail offer, with women's fashion also very well represented in the town centre. We would not expect a centre of this size to provide a complete range of comparison retail units, indeed there are several types of retailers that are not present within the town, such as the lack of men's clothing retailers.
- 5.129 The current convenience goods provision in the town centre is low and provides three grocers and delicatessens, two bakers and confectioners, one butchers, one greengrocers, one health food shop, one off license and one shoe repair/key cutting shop. There is no supermarket provision in the town centre, the only supermarket provision is the Sainsbury's in an out-of-centre location (discussed below).
- 5.130 Cafes, restaurants, hotels and pubs comprise the largest number of service units in the centre. Hair salons, estate agents and other professional services are also well represented. Services units are of a high quality, particularly along Church Street, Market Street and Silver Street.
- 5.131 Financial and property services are focused along Church Street near the Catholic Church, although property services are evident throughout the town centre, representing the town's strong attraction as a satellite conurbation for larger centres of Trowbridge, Bath and Bristol. Secondary elements of retail provision are situated

along Market Street, punctuated by residential uses to the north. Access in this part of the town centre is limited, with vehicular traffic being limited to single file at pinch points. This route is often congested at peak times owing to the limited scope for widening the carriageway as a result of the historic street pattern. A large proportion of the traffic was observed to be servicing the construction of the Kingston Mills development on the northern bank of the Avon.

- 5.132 Toward the south of the town centre on the southern bank of the Avon, the town's library and museum are situated alongside several hotels and restaurants, set against a towpath walk along the river. Moving further south out of town toward the Sainsbury's superstore there are several smaller parades of shopping, becoming more secondary in nature as one moves further from the town centre.

Vacancies

- 5.133 The Council's 2008 survey data indicates that the town centre has 13 vacancies, which represents 10% of the total town centre units. There are very few vacancies within the centre of the town, and vacancies are located in secondary areas of the town. Those properties that are vacant appeared to have been vacant for some time, perhaps suggesting that these were as a result of longer-term issues specific to those locations i.e. poor access, structural instability and servicing for example.

Town Centre Environment

- 5.134 The town centre benefits from an excellent shopping environment, with very clean streets, small quiet areas of public seating and space amongst a traditional and organic street pattern. The central spine to the northern element of the town centre can be congested and noisy at peak times, but this is only at peak times and a result of the narrow street pattern bringing pedestrian and vehicular interaction closer at pinch points. We understand that the Historic Core Zone Project currently being developed by the Council is aimed at addressing these issues and aim to give priority to pedestrians. Generally the town centre is quiet, clean and whilst there are limited areas of green space within some areas of the town centre, several areas of excellent open space and landscaping are within easy walking distance of the centre, all of which are complemented by the River Avon running through the centre of the town.

Development Opportunities

5.135 The Kingston Mills development comprises a significant site adjoining the River Avon and Silver Street, which at the time of survey was under construction. We understand that the site is being redeveloped to provide 170 new homes, a convenience store, a bar, riverside restaurant, community building, offices, retail units and new public space, with the potential for works to the southern bank of the Avon to allow a footbridge between the new development and the museum / library. The proposals are expected to deliver 198 car parking spaces, and propose a range of access arrangements to alleviate town centre congestion. Overall, this development, when complete, is likely to improve the overall retail/leisure offer in the centre to the benefit of the centre. We have not identified any other significant redevelopment opportunities within the town centre.

Edge/Out-of-Centre Retail Provision

5.136 The only supermarket in Bradford-on-Avon is the out of centre **Sainsbury's at Elm Cross Shopping Centre**, situated to the south of the town centre off Frome Road. This store comprises 1,884 sq m sales area and offers a wide range of convenience goods, along with around 15% of the store also offering comparison goods in the form of CDs, DVDs, home electricals and small appliances, a limited clothing offer along with books, stationery and gifts. The store has a delicatessen, cheese counter, and offers 19 regular checkouts along with several self-serve checkouts. Additional retail units are also located at Elm Cross Shopping Centre, currently comprising a café restaurant, a hot food takeaway and dry cleaners.

Summary

- Overall, Bradford on Avon is a historic town with irregular street patterns, which provide variety and attractiveness to the centre. The town performs the function of a local service centre as well as catering for the high proportion of visitors, with a strong provision of independent specialist shops.
- Service uses and comparison retail dominate the town centre provision through cafes, restaurants, hotels and ladies fashion all well represented. Convenience provision is limited with no supermarket provision in centre, and there are an average number of vacant units, with few vacancies in the key shopping streets. Overall the town seems to be relatively healthy, although improvements can be made to the shopping offer as well as dealing with the particular traffic

congestion issues which the centre experiences at peak times, which would improve the physical environment.

Calne

5.137 Calne is situated at the north western extremity of the North Wessex Downs, an Area of Outstanding Natural Beauty and lies on the River Marden and the Wiltshire and Berkshire Canal. It lies approximately six miles east of Chippenham and 13 miles west of Marlborough. It is one of the oldest market towns in Wiltshire. The main shopping areas in Calne are the High Street, Wood Street, Church Street and Phelps Parade Precinct, which is a small pedestrianised open 'mall'.

Accessibility

5.138 Calne has a good selection of town centre car parks and a moderately well connected transport network. Local buses link the town with Chippenham, Swindon, Bath and Devizes. Traffic flows are relatively heavy and impose a strong 'edge' to the town centre separating it from commercial uses and residential areas to the west.

Diversity of Uses

5.139 The Wiltshire Council survey of Calne in September 2008 indicates that the town centre has approximately 45 retail units comprising 5,330 sq m gross retail floorspace (see Table 5.8 below). There are eight convenience units (3,460 sq m gross) and 32 comparison units (1,675 sq m gross). In addition, there are 73 service units.

Table 5.8: Calne Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	8	32	73	9	122
Percentage of Total (%)	6.6	26.2	59.8	7.4	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-1.06	-3.21	24.57	2.46	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, September 2008 Survey

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- 5.140 Calne has a good representation of supermarkets within the town centre; Somerfield (1,079 sq m net); Sainsbury's, which was extended in 2007 (1,581 sq m net); and Iceland (512 sq m net). There is however a distinct lack of other smaller food retailers, for example there are no butchers, delicatessens, fishmongers, greengrocers or bakers in the centre. This contributes to the slightly below average representation of convenience food retailing in the centre. Calne's retail offer is complemented by several regular markets held in the Market Place in the Pippin. A general market is held weekly on a Friday offering a range of different goods and there is a monthly farmers market selling local produce.
- 5.141 There is a below average representation of comparison retailers in the town, totalling only 26% of all retail and service units in the centre. Non-food multiple retailers in the town include Boots and several banks. Chemists, charity shops and textile and soft furnishing shops dominate the comparison offer of the centre. There is a distinct lack of ladieswear and menswear retailers in Calne.
- 5.142 In terms of service provision, this is very high in Calne, accounting for 60% of the total units in the centre. There is a very high proportion of property services, health and beauty shops, clubs and fast food takeaway outlets. No travel agents, bars, dry cleaners, bingo halls or careers advice were identified within Calne. Other uses in the town include a large, modern library, hotel, heritage centre and leisure centre. There is also a monthly arts and craft market held throughout the summer.
- 5.143 A recent initiative called 'New Heart of Calne' included the redevelopment of a section of the Phelps Parade Precinct in 2009. A new mixed-use building was constructed on the site of the former Kwik Save with retail at the ground floor opposite Sainsbury's. It was intended that this retail unit would be occupied by Woolworths; however the retailer went into administration and the unit remains unoccupied.

Vacancies

- 5.144 Calne has a relatively high level of vacancies at around 2.46% above the national average. In September 2008, the Council survey recorded five vacant retail units and four vacant service units; however it is evident that vacancies have since increased and there are now ten vacant units in the centre including two vacant units in Phelps Parade, as well as several prominent units along the pedestrianised part of the High Street and along Church Street.

Town Centre Environment

5.145 There are several notable buildings in Calne including St Mary's Church, an array of houses on The Green and the Town Hall. Church Street, which lies on the southern edge of the town centre, presents an attractive setting, which has been enhanced with the construction of a new library which opened in 2001 and has won awards for its innovative and modern design. By contrast, the area around Somerfield is unattractive due to the fragmented nature of development and layout of piecemeal developments. Phelps Parade is dated in its style and design although various improvements have been made including the addition of a new glass roof and the redevelopment of the former Kwik Save store which has enhanced linkages between the High Street and Sainsbury's.

Development Opportunities

5.146 Focus lists one retailer requirement for Calne from Boswell's Café who are seeking between 186 sq m and 279 sq m of floorspace. Overall, we would not expect a centre of this size to have a large number of retailer requirements.

Summary

- Calne is one of the oldest market towns in Wiltshire. Service provision dominates the centre, with a below average supply of convenience and comparison units, which is not unusual for a town of Calne's size. Convenience goods are provided by Sainsbury's to the east of the centre which was recently extended and Somerfield in the town centre. The offer is also enhanced through a weekly general market and monthly farmers market. Calne has an above average number of vacant units, including some dominant units on the High Street. The town centre environment is varied; Church Street being an attractive area of the town, with the quality deteriorating in the area around Somerfield.

Corsham

5.147 Corsham is a historic market town situated in North West Wiltshire on the A4 between Bath and Chippenham. The town has several notable features which attract people to the area and to the shops in the town centre. Corsham Court is a privately owned stately home and is renowned for its fine art collection. The Court is also used by Bath Spa University and The National Society for Education in Art and Design. There is also

a set of 17th Century Almshouses. Corsham is also home to several Ministry of Defence operations, who are a significant employer in the town.

Accessibility

5.148 The main public car parking lies adjacent to the Martingate Centre. This is a pay and display car park, although a scheme is in operation where shoppers can claim back the cost of car parking from participating retailers. Corsham is relatively well served by public transport and there are bus routes to Chippenham, Melksham and Bath.

Diversity of Uses

5.149 Corsham has approximately 3,083 sq m of retail floorspace in 45 units based on the most recent Wiltshire Council survey conducted in April 2008 (see Table 5.9 below). This comprises approximately nine convenience units (1,184 sq m net) and 34 comparison units (2,958 sq m net). In addition, Corsham also has 65 service units including several estate agents, a post office, as well as cafés, restaurants, takeaways and traditional public houses, resulting in a total of 112 units.

Table 5.9: Corsham Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	9	34	65	4	112
Percentage of Total (%)	8	30.4	58	3.6	100
National Average	7.66	29.41	35.23	9.86	-
Variant (%)	0.34	0.99	22.77	-6.26	N/A

Source: Experian Goad Category Report, August 2009 and Wiltshire County Council Environmental Services Department, April 2008 survey

5.150 Corsham's retail offer is divided between two character areas; the traditional High Street, which is notable for its attractive buildings and Conservation Area and is home to various specialist shops; and the Martingate Centre, which is a purpose built arcade anchored by a small Somerfield, which has recently been taken over by the Co-Op. The convenience retail offer in Corsham is strong and is enhanced by the many independent shops that sell high quality, locally produced goods, for example, Artingstall butchers, Barnett Bros grocer, The Deli at Corsham delicatessen and Green Ginger Health Foods. Somerfield / Co-Op is the main anchor, although given its size

(884 sq m net), it is unlikely to be catering for 'main' food shopping trips for those who have access to a car and can travel to larger foodstores in Chippenham, Melksham and Bath. Nevertheless, it is a vital 'top-up' facility and important foodstore for those who are less mobile.

- 5.151 Corsham's retail offer is dominated by local independent retailers, with the exception of Boots and Somerfield/Co-Op, which gives the centre a unique retail offer. Comparison retailing in Corsham is strong, with a slightly above average representation in this sector. There is an above average number of units selling more niche goods such as furniture shops, music and instrument shops and florists. There is a below average representation of clothing retailers (men's and women's) which is to be expected for a town of this size.
- 5.152 Approximately 58% of the total retail units in Corsham are service units, (22.77% above the national average). Health and beauty salons and estate agents are well represented and there are also number of high street banks in Corsham, including HSBC, Lloyds TSB and Natwest. Leisure related service uses within Corsham are below the national average. Particularly noticeable is the lack of any cafes in the town centre. There is also an under representation of theatres, restaurants, bars, pubs and sports and leisure facilities. It is apparent that Corsham is not a destination for evening activities such as eating and drinking, and therefore has a limited evening economy.
- 5.153 Other uses which add to the vitality and viability of the centre include a library, tourist information centre and arts centre. There is also a weekly market on Fridays.

Vacancies

- 5.154 The table above indicates that Corsham has a particularly low number of vacant units, approximately 6.26% less than the national average. The Council's April 2008 survey supports these findings and notes four vacant units (two retail and two service units) in Corsham. Since the survey it appears vacancies have not changed considerably. There are now two vacant units in the Martingate Centre, which are currently available to let. The former Perfect Rooms and Interior Decorating unit along the High Street is also vacant, as well as the former Salt and Vinegar Chip Shop, although we note that a sign in this shop states that it is not available to rent. The former Methuen Arms Hotel at the southern end of the high street is currently vacant.

We understand that this site has been bought by an owner occupier and is subject to various planning applications to bring it back into use as a hotel, restaurant and pub.

- 5.155 Local agents report that rental levels in Corsham are around £18 per sq ft. Yields are around 7.5% to 8% and are reasonably static. Operator interest is weak and is mainly from local operators. The Focus database lists one requirement from Brighthouse who are seeking between 209 and 325 sq m gross of floorspace.

Environmental Quality

- 5.156 Corsham has an attractive town centre environment. The Martingate Centre and part of the High Street are pedestrianised, creating a safe traffic free area. Although the Martingate Centre itself is beginning to look dated, the rest of the town centre and in particular the High Street is of a very high quality where historic buildings and shop fronts are well maintained and designed to be in-keeping with the Conservation Area. There is also a good provision of street furniture and the streets are generally very clean and well maintained. Overall, Corsham is an attractive town centre benefiting from visitor and tourist trade.

Development Opportunities

- 5.157 Corsham has a good provision of specialist, independent retailers, which are more likely to cater for occasional purchases and tourists rather than the everyday needs of local residents. The main focus for Corsham over the LDF period should be to acquire a better range of everyday shops and services to better cater for the need of local residents and to help reduce the number of trips made by car to other destinations. At the same time, it will also be important for Corsham to maintain and enhance its specialist and independent shops to retain its distinctiveness.

Summary

- Corsham is a historic market town in north west Wiltshire. In terms of the diversity of uses, Corsham is performing close to the national average, with a slightly higher number of service units and a low proportion of vacant units. Convenience goods provision includes a Co-Op and other local food retailers. The mix of units indicates that the centre is performing healthily. The retail offer is dominated by

local independent retailers, providing a unique retail offer. Corsham also benefits from tourist visitor trade, improving the centres vitality and viability.

Cricklade

- 5.158 Cricklade is a small market town situated towards the northern border of Wiltshire with Gloucestershire midway between Swindon and Cirencester. Cricklade is located at the southern gateway to the Cotswold Water Park, an area of 140 lakes set in 40 square miles of countryside offering a country park, angling, bird watching, sailing and water sports amongst other activities and is a major tourist attraction.
- 5.159 The centre is easily accessible by road, with the A419 bypassing the town, running the north east of the town connecting Swindon and Cirencester. Buses connect the town to the centres of Swindon, Wootton Bassett and Purton.

Diversity of Uses

- 5.160 Cricklade's retail offer is concentrated along the High Street where retail and service uses are interspersed with residential uses. There is a good mix of convenience and services uses in the town. The number of comparison retail units is below the national average, but is not of significant concern because the town appears to cater for local day to day needs rather than providing an extensive comparison goods offer. The number of vacancies in the town is also below average.

Table 5.10: Cricklade Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	5	11	24	2	42
Percentage of Total (%)	11.90	26.19	57.15	4.76	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	4.24	-3.22	21.92	-5.1	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, July 2009 survey

- 5.161 Cricklade is one of the smallest town centres in Wiltshire. According to the Wiltshire Council survey of July 2009, there are a total of 16 retail units comprising 663 sq m of

retail floorspace (see Table 5.10 above). Cricklade has five convenience units (comprising 279 sq m net) and 11 comparison units (385 sq m net). Cricklade's convenience offer comprises a small Tesco Express, as well as an independently owned grocers store and an independent butcher. The town has a good convenience provision for a town of its size, currently above the national average.

5.162 In terms of comparison retail provision, Cricklade has a below average representation, representing just over a quarter of all retail units in the town. Comparison retailers include a Boots pharmacy, ladieswear, framing shop, fabric shop, pet food, DIY and outdoor and sports goods shops. Comparison retailing in Cricklade seems suited to a town of this size.

5.163 The town has a number of service uses (24 units) including several public houses, takeaways, a café, hairdressers and estate agents. There were only two vacant units identified, this is well below the national average and indicates that the town is performing well. There are no major leisure uses provided within the town. Two significant events also happen within the town, including the annual Country Market and the Town Festival, usually held in June.

Environmental Quality

5.164 Free car parking is available along the High Street, allowing shops to benefit from passing trade. The town centre environment is of a good quality; there are many well maintained historic buildings, which add to the town's attractiveness as a destination.

Summary

- Cricklade is located in the north of Wiltshire and is one of Wiltshire's smallest town centres, with retail provision dispersed along the High Street where retail uses are interspersed with residential uses. The town is dominated by service uses including several public houses, whilst the key anchor store in the centre is Tesco Express. During our site visit in July 2010 we found that there was only one vacant unit, indicating that the centre is performing well for its size, whilst the environmental quality of the centre is good.

Devizes

- 5.165 Devizes town centre is situated close to the centre of Wiltshire, 10 miles southeast of Chippenham and 11 miles east of Trowbridge. The town is located on the A361 linking the town with Trowbridge and the A342 to Chippenham. The town centre is arranged around a Market Place, which is dominated by the A360 (Long / Northgate Street) and a Council car park, which has capacity for 60 car parking spaces.
- 5.166 The town centre benefits from a number of older buildings, several of which are concentrated within the Brittox / Little Brittox area of the town centre. Elements of the town centre are pedestrianised, and within these areas the town's environment is at its most pleasant. Cycle parking bollards, seating areas, new street lighting, planting and modern paving provide a pleasant shopping environment in the town centre.
- 5.167 Primary areas of retail activity are focused around the Brittox and Little Brittox area, with the majority of units in this area being involved in the sale of comparison goods. Toward the more secondary areas of Sheep Street, Sidmouth Street, Estcourt Street (west), Market Place, Maryport Street and High Street, service units become more evident, along with further vacancies appearing.

Accessibility

- 5.168 The town centre has limited car parking capacity, and although there are areas of on-street car parking this is dotted around the town and at peak times can lead to congestion through the town's car parking areas. The informal street layout provides pinch points to movement within and around the town centre; however traffic is successfully diverted around the town via traffic management and routing.
- 5.169 Devizes has several bus routes, many of which are routed through the Market Place area. Local buses connect Devizes to the centres of Bradford-on-Avon, Chippenham, Marlborough, Salisbury, Swindon, Warminster and Wootton Bassett. The town's railway station closed in the 1960s, and the town now relies upon neighbouring centres of Chippenham, Pewsey and Westbury for linkages to the national rail network.

Diversity of Uses

- 5.170 The town's retail composition is illustrated at Table 5.11 below, which is based on survey information provided by Wiltshire Council (August 2008 survey). The survey
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results indicate that Devizes' town centre retail offer comprises a good range of comparison retailers, which is above the national average (2.33%).

Table 5.11: Devizes Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	22	100	177	16	315
Percentage of Total (%)	6.98	31.74	56.19	5.07	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-0.68	+2.33	+20.96	-4.79	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, September 2008 survey

Convenience

- 5.171 The Council's 2008 survey data shows that the convenience offer within the town is slightly below the national average, the range of food and convenience retailers is good and comprises a butchers, two greengrocers and a bakers; which complement the wider offer available within the larger food retailers. Supermarket provision includes a Sainsbury's, Somerfield, Tesco Metro and Morrison's.
- 5.172 The Sainsbury's store opened in 2002 and provides 1,170 sq m of sales area across a single floor. The store has a customer car park to the rear (north) with capacity for 150 vehicles, and benefits from strong pedestrian footfall in this area of town. The store also provides a bakery and in-store deli counter. The Somerfield store is located on High Street and contains a tobacco kiosk, 7 checkouts and customer car parking to the rear. The store opened in 1972 the store provides 740 sq m of sales area. At Maryport Street there is a Tesco Metro store, which also has dedicated customer car parking. This store was opened in 1969 and comprises 1,746 sq m retail sales area across two floors; with ground floor containing the store's food and grocery elements, with the mezzanine providing CDs, DVDs, clothing, books, cookwares, electrical, household, and toys and games.
- 5.173 The largest food store in the town is the Morrison's store, which is located to the east of the town centre on Estcourt Street, and comprises 4,121 sq m retail sales area. The

store opened in 1991 and provides a range of services in-store, including a meat, fish, bakery, deli and cakes counter. The store also as an in-store pharmacy and café.

Comparison

- 5.174 The 2008 Council survey shows the proportion of comparison retailers is above the national average, and comprised of a good number of multiple retailers in the town centre; a clear indication of the town's attractiveness and wider retail offer. This is complemented by the markets held on Tuesday, Thursday, Friday and Saturday within the Shambles and Market Place areas and there is also an indoor market hall. The markets specialise in the sale of a variety of different goods, including a general market, a flea market and an antiques market. The town benefits from a good range of independent retailers throughout the town centre. The markets sell a wide range of goods from second-hand jewellery and china to artwork, DVDs, books and furniture.
- 5.175 The main area for comparison retailing in the town is around the Brittox and Little Brittox parts of the town centre, which has particularly strong representation within the ladieswear, books / stationery, jewellery and electrical goods areas. The town also has a strong representation from furniture retailers, with 12 units within the town selling primarily home furnishings.

Service and Leisure Uses

- 5.176 The majority of service provision within the town centre is within the café / restaurant, public houses / hotels and takeaways units. These uses are present throughout the town, with the only minor concentration of which being located in Sidmouth Street. The quality of these services is generally good, and includes chain restaurants such as Pizza Express and independently run cafes and Indian restaurants. Even the takeaway restaurants within the centre are of a generally good quality in contrast of the quality of these units found in other towns. There is a concentration of financial, property and business services to the west of the town centre around the St John's Street and Market Place area; the former containing a number of banks and buildings societies, while the latter is characterised by estate agents and mortgage agencies.
- 5.177 Devizes has a relatively good leisure provision for a market town. The Palace Cinema provides a single screen cinema and bingo hall and is located on Market Place/Northgate Street. Within the town centre there is also a theatre, Wharf Theatre,

on Sidmouth Street which adds to the leisure offer of Devizes. Devizes Leisure Centre is located out of centre, to the south east of the town. The leisure centre is a modern facility comprising a swimming pool, sports hall, tennis and squash courts, gym and dance studio.

Vacancies

- 5.178 The number of vacancies is below the national average, with very few vacancies situated within the main retail core along Brittox and Little Brittox. The more retail secondary area of Sidmouth Street, which contains several hairdressers and take-away outlets, contains the only concentration of vacant units within the town, mainly at the east of Sidmouth Street near the junction with Estcourt Street.

Environmental Quality

- 5.179 The main areas for retailing in the town centre benefit from being located away from the main traffic routes, with much of this area being pedestrianised. Within these parts of the town centre public seating, bins, cycle parking, planting and hanging baskets and effective paving ensures that these areas are safe, quiet and pleasant with very little evidence of litter at the time of survey. Secondary areas can be noisy where these come into contact with the road network, particularly around the Estcourt Street / Sidmouth Street junction and at the Grand Market Place surface-level car park, but this is an exception to the remainder of the town, which is identified as providing a safe and clean area for shopping.

Pedestrian Flows

- 5.180 Several pedestrian flowcount surveys have been undertaken in Devizes over the period between 1995 and 2008. Overall, pedestrian numbers have increased between each survey, until 2008 where the figures are broadly similar with 2005 data. The surveys indicate that Little Brittox, The Brittox and Market Street generally achieve the highest levels of pedestrian flow, consistent with the main retail activity and the primary shopping frontage. As would be expected, the more peripheral, secondary areas which contain a number of residential properties and businesses, (e.g. Long Street and New Park Street) achieve the lowest levels of pedestrian activity.

Retailer Demand

5.181 The Focus database has four requirements from retailers looking to locate in Devizes, including three comparison retailers including Bell Books, Edinburgh Woollen Mill and the Card Factory. There is also a requirement from Café Nero.

Development Opportunities

5.182 As a result of the irregular street pattern and historic nature of many buildings within Devizes, the opportunity to assemble sites of sufficient size that are viable to redevelop is limited. However, our review of the centre found a number of sites which could be suitable for further town centre uses which we briefly discuss below. For example, a large open-air car park with capacity for around 170 vehicles is situated to the rear (south) of the Brittox, which currently serves the Somerfield and Tesco car parks. Given the position of this site between the two secondary areas of retail at Maryport Street and High Street, and to the rear of the Brittox, this site could potentially be intensified to increase the scale of car parking and introduce additional retail and service floorspace into the town centre. This would represent a minor intervention into this area of the town centre, and would not be likely to require significant highways works to intensify the site. The key to maximising the potential of this site would be to achieve strong pedestrian linkages to the Brittox, and also deliver easy access from High Street / Maryport Street.

Customer Views and Behaviour

5.183 An in-centre survey of 150 shoppers was undertaken in June 2010, which included various attitudinal questions on the reasons for choosing to visit Devizes town centre, frequency of visits and likes/dislikes about the centre. The key findings are summarised below.

- A high proportion of shoppers (80% of respondents) classed themselves a 'local shopper' whilst there were also a relatively high proportion of tourists, including 11% cited they were a 'day tripper/visitor' and 3% cited they were 'on holiday'.
- 37% of people stated that 'food shopping' was their main purpose of visit, whilst 31% cited 'non-food shopping' and 7% stated 'shop in the market' or 'socialising'. Despite the relatively strong proportion of comparison retail units in the town, only 15% mentioned that Devizes is their first choice destination for non-food shopping. Of those who cited Devizes was not their first choice destination, 44% normally

went to Swindon, whilst 31% and 10% cited Trowbridge and Chippenham as their first choice destinations, respectively. These locations are within 25 to 35 minutes drive from Devizes and although Swindon has a larger retail offer, the number of units in Trowbridge, Chippenham and Devizes is broadly similar.

- The majority (53%) of shoppers expected to buy 'food and groceries' during their visit to Devizes. 13% expected to buy 'clothes and shoes' and 9% cited 'nothing'. This indicates that Devizes is a destination for convenience goods, rather than comparison retail. This is demonstrated further by 52% respondents stating that they disliked Devizes because of the 'poor range of comparison retailers' and 29% cited 'poor department store offer'. The improvements people want to make to the centre also regard comparison retail, including 58% stating the need to 'attract larger retailers' and 16% citing 'clothes/shoes shops'.
- Reflecting the proportion of local shoppers, the majority (74%) stated that they chose to come to Devizes because it was 'close to home'. Indeed, the majority of visitors (74%) travelled for 20 minutes or less to get to Devizes.
- Indeed 42% cited that Devizes is 'easily accessible from home' was what they liked about the town. 16% indicated that they like the 'attractive environment' thought it was 'a nice place' and 13.3% cited 'good range of smaller independent retailers', indicating the wide variety of shops within the centre.
- The majority (53%) of shoppers visit Devizes for shopping '2-3 days a week'. 53% of visitors use the services in Devizes 'once a week'. 27% of visitors use food and drink facilities in the town once a month, indicating that the town provides a relatively good restaurant and bar offer. The majority of visitors (41% and 58%) 'never' use leisure facilities or tourist attractions, respectively, in Devizes. These figures indicate that the town provides an important retail role for local shopping, but also caters for eating and drinking.

Edge/Out-of-Centre Retail Provision

- 5.184 There is one main foodstore in an out-of-centre location in Devizes, the Lidl on London Road. The store has an approximate floorspace of 1,060 sq m. The store is located on the opposite side of the river from the town centre, to the north east of Devizes.

Summary

- Devizes town centre is situated around a Market Place, with some areas of pedestrianised streets and historic buildings providing an attractive centre. Devizes provides a good selection of convenience, comparison and service uses, including several supermarkets (Sainsbury, Somerfield, Tesco Metro and Morrison's) and ladieswear shops.
- The leisure offer in relation to cafes and restaurants is of a good quality with a variety of chain and independent cafes, which appear to be popular with shoppers. The cinema, theatre and leisure centre also provide a good range of leisure facilities. The centre is well maintained and has a low proportion of vacant units, indicating that Devizes town centre is in good health.

Ludgershall

5.185 Ludgershall is a town located in the east of Wiltshire, two miles to the north east of Tidworth. The town is a 30 minute drive south to Salisbury and a 15 minute drive to Andover. Similarly to Tidworth, Ludgershall has a strong military presence due to the close proximity of the Salisbury Plain. Ludgershall is a smaller centre than neighbouring Tidworth, and policy states that the settlements should be considered jointly due to their complementary roles. This section should therefore be read alongside the healthcheck for Tidworth.

Accessibility

5.186 Ludgershall is in a slightly more rural location than Tidworth, and the A338 at Tidworth is the closest main road network to the town. The A342 runs through Ludgershall from Devizes and Pewsey in the west to Andover in the east. Ludgershall is on the same bus route as Tidworth, which connects the centres to Salisbury and Andover. Historically a train line ran through the town, however this was closed in the 1960s. Retail and leisure units in the town are located along Tidworth Road, Andover Road and the High Street in a rather disjointed manner. A free car park is located on Tidworth Road.

Diversity of Uses

5.187 The retail composition in Ludgershall is illustrated in Table 5.12 below. The Council survey of July 2009 identified 39 retail and service units, comprising approximately 1,257 sq m comparison and convenience floorspace area. Service units dominate

the town centre provision, with 22 units in total which represents nearly half of the town's retail units. Convenience unit provision is in line with the national average, while comparison unit provision is 6.33% below the national average. The number of vacancies is also above the national average.

Table 5.12: Ludgershall Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	3	9	22	5	39
Percentage of Total (%)	7.69	23.08	56.41	12.82	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	0.03	-6.33	21.18	2.96	N/A

Source: Experian Good Category Report, July 2009 and Wiltshire County Council Environmental Services Department, July 2009 survey

- 5.188 The major convenience food retailers are located in a cluster on Andover Road. The largest food retailer in the town is Co-op which has a sales area of 429 sq m. The store is open Monday to Saturday from 7am to 9 pm and Sundays from 10am until 4pm. On the opposite side of Andover Road is a Tesco Express store which has a sales area of 159 sq m. Tesco Express is open 6.30am to 10pm Monday to Saturday and 7am until 20pm on Sundays. Adjacent to the Tesco store is a Spar convenience store providing further convenience goods. The food offer is enhanced through independent retailers such as the butcher and the confectionary, tobacco and news retailer (CTN). The main foodstore provision in the centre is disjointed from the other retail provision which limits opportunities for linked 'walking' trips to the other provision in the centre.
- 5.189 Comparison retail in Ludgershall is limited. Our site visit in August 2010 identified that the comparison offer has reduced since the 2009 council survey and only five comparison units were identified. Comparison units in the town include a cycle shop, a motor shop, fireplace shop, a DVD and gift shop and a homeware and gift shop. The centre's retail offer in the last decade has fallen and this is partly due to the loss of retail floorspace to a doctor's surgery and the loss of three vacant units in Station Approach to housing between 2004 and 2006.
- 5.190 Service units comprise the main provision in the town. Our site visit in 2010 confirmed that there is still a good mixture of services in Ludgershall including a Post Office, two

estate agents, three hairdressers and beauticians, two public houses, two restaurants, three takeaway restaurants, a solicitors, a tanning salon, a café and a solicitors. The majority of service units are located on the High Street and Tidworth Road.

Vacancies

- 5.191 The council survey indicated that there were five vacant units in 2009, which was 2.96% above the national average. Our site visit in 2010 identified only three vacant units, which means that the number of vacant units in the town has decreased. Ludgershall now has a low level of vacant units; two vacant units are located on Tidworth Road and one unit is vacant on Andover Road.

Town Centre Environment

- 5.192 The traditional centre of Ludgershall is focused around Ludgershall High Street and Tidworth Street, attractive streets with several attractive historic buildings. A historic square and war memorial is located at the junction of the two roads. There is a pedestrian crossing along the High Street, creating easy access for pedestrians from the car park to the parade of shops. The Crown Inn and the Queens Head are traditional village pubs, attractive and set back from the road with outside seating. This area of Ludgershall is a well maintained and attractive environment.
- 5.193 Eastwards along Tidworth Road, the appearance of shop fronts deteriorates slightly. Shops are separated by individual houses and the centre feels more disjointed. At the cluster of convenience stores on Andover Road the appearance of shop units is less attractive. The Co-op and Tesco occupy single storey stand alone stores, and a small parade of shops (from Spar to a takeaway restaurant) are located on the ground floor, with two stories of residential above. This block of buildings is in particularly poor repair and is not well maintained.

Summary

- Ludgershall town centre is close to Tidworth, and is also influenced by the strong military presence in this area of Wiltshire. The town has a strong representation of service and convenience units, and a low representation of comparison retailers which are generally located in a rather disjointed manner throughout the centre. In the last decade the centre has seen a fall in retail units mainly as a result of the

conversion of long standing units to non retail uses. Food stores in the centre include Co-op and Tesco Express, which are located opposite side to each other on Andover Road.

Malmesbury

- 5.194 Malmesbury is a historic market town located on the A429 between Cirencester and Chippenham. The centre lies to the north of the M4, close to Swindon and Tetbury. The town's main employer is Dyson, who have their headquarters on the edge of the town. Malmesbury's retail area runs along the High Street, which links through to the Market Cross, the Abbey and the Abbey House Gardens, which are significant tourist attractions.

Accessibility

- 5.195 There is a short stay pay and display car park at Cross Hayes in front of the Town Hall and adjacent to the High Street. There is a pay and display long stay car park at Station Yard, which due to the local topography is at a lower level than the High Street, and shoppers have to climb up a set of steps to get to the town centre via the Abbey. There is also on-street parking along the High Street (one-way only), which allows shoppers to park outside the shops for short periods of time. The town is served by several bus routes to Swindon, Chippenham and Cirencester as well as surrounding towns and villages, although we note that buses are not very frequent.

Diversity of Uses

- 5.196 The retail composition in Malmesbury is illustrated in Table 5.13 below. According to the Council's latest survey data (April 2008) Malmesbury town centre has approximately 2,507 sq m net of retail floorspace. There are eight convenience units comprising approximately 447 sq m of floorspace; 40 comparison units with 1,923 sq m net of floorspace. In addition, there are 69 service units resulting in a total of 124 units. Malmesbury's convenience offer comprises a small Co-op store located along the High Street, which is supplemented by several small independent uses including a butchers and bakery. A farmers market is also held on the second and fourth Saturday of every month.

Table 5.13: Malmesbury Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	8	40	69	7	124
Percentage of Total (%)	6.5	32.3	55.6	5.6	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-1.16	2.89	20.37	-4.26	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, April 2008 survey

5.197 There are several multiples present in Malmesbury including Boots, WH Smith, Lloyds Chemist and Clarks Shoes, as well as several banks, building societies and estate agents. The remaining units are occupied by independent operators; of note is Knees Ironmongers, Greene Grey, a high quality gift, kitchen and household accessory shop, which has recently taken over two units (the former Halifax and the former That New Shop) and CH White Bicycle shop. Malmesbury also has a number of cafés, takeaways and public houses, which are of a good quality throughout the centre from the south of the High Street (The Smoking Dog public house) to the north at Market Cross including The Whole Hog bar and restaurant and The Summer Cafe. The Old Bell Hotel is situated adjacent to the Abbey and is reputedly the oldest surviving hotel in the country. Other uses in the town include the Malmesbury Gallery, the Athelstan Museum, a Citizens Advice Centre, library and tourist information centre.

Vacancies

5.198 The Council's survey (April 2008) indicates there are three vacant retail units and four vacant service units in Malmesbury. Our recent site visit identified two vacant units in the centre; the former Beauty Retreat on Gloucester Street and the unit formerly occupied by Off Da Hook on the High Street. We understand from local agents that Malmesbury has a relatively healthy level of retailer demand, mainly because of its role as a tourist centre and the quality of its existing retail offer. The Focus database lists two requirements for Malmesbury; the Edinburgh Woollen Mill is seeking between 139 sq m and 279 sq m and there is a requirement from a Coffee shop operator for between 121 sq m and 232 sq m, which is good for a centre of this size.

Town Centre Environment

- 5.199 Malmesbury has a very attractive historic town centre environment, which is generally well maintained. The Market Cross and the Abbey are important landmarks and help to distinguish the centre creating a unique identity. This does however mean that development opportunities are limited and shop sizes are often constrained.

Edge/Out-of-Centre Retail Provision

- 5.200 In Malmesbury there is an out-of-centre Somerfield foodstore. The store is situated to the north west of the town centre. In terms of retail floorspace the unit has an approximate size of 800 sq m. The Somerfield store benefits from a customer car park.

Summary

- Malmesbury is a historic market town in the north of Wiltshire. The town has a good mix of retail and service uses, although the low convenience unit representation is enhanced through farmers markets held fortnightly. There are several multiple retailers including Boots, WH Smith and Clarks Shoes which is good for a town of Malmesbury's size, including the Co-Op. There are a low proportion of vacancies in the centre and the town centre has a very attractive environment.

Marlborough

- 5.201 Marlborough is an attractive market town located in north east Wiltshire, south of the M4. The town is 12 miles north east of Devizes on the A4 London to Bath Road, 10 miles south of Swindon on the A345 and 23 miles north of Salisbury on the A346.

Accessibility

- 5.202 Marlborough has a good provision of car parking. With the exception of market days (Wednesdays and Saturdays), short stay car parking is available in the middle of the High Street on a pay and display basis. There are also car parking bays on either side of the High Street which are available free of charge for up to 30 minutes. In addition, there are several surface car parks including a large car park to the rear of the Castle and Ball Hotel; Kennet Place; Waitrose and Hyde Lane. There are bus services to local towns and villages including Andover, Calne, Devizes, Pewsey, Salisbury and Swindon.

Diversity of Uses

5.203 Marlborough's retail offer is concentrated on either side of the High Street, which is unusually wide with car parking along each side, as well as in the middle of the street. There are several small areas of retailing adjacent to the High Street including Hughenden Yard and Hiller's Yard, which both consist of clusters of small retail units.

Table 5.14: Marlborough Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	12	88	106	12	218
Percentage of Total (%)	5.50	40.37	48.63	5.50	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-2.16	10.96	13.40	-4.36	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, July 2009 survey

5.204 The retail composition of Marlborough is illustrated in Table 5.14 above. The Council's survey of 2009 found that Marlborough has 100 retail units (convenience and comparison) comprising 8,592 sq m retail floorspace. Of this, 12 units are occupied by convenience uses and 88 are occupied by comparison uses. In addition, there are 106 service units and the retail offer is supplemented by a twice weekly market on Saturdays and Wednesdays, a farmers market held on every second Saturday of each month and an annual Continental market. Marlborough's convenience offer is anchored by a Waitrose supermarket (2,241 sq m net), which is located along the High Street adjacent to Hillier's Yard with car parking to the rear. There used to be a Marks and Spencer Simply Food store, but this closed during 2009 as part of a nationwide cost cutting exercise by Marks and Spencer. There is also a One Stop newsagent, Greggs bakers and several independent specialist convenience operators including a sweet shop, butcher and deli.

5.205 Marlborough has a strong non-food offer for a town of its size with a particularly high proportion of women's fashion and fashion accessory operators. There is a mix of multiple operators including Monsoon, White Stuff, Fat Face, Fenn Wright Mason and Phase Eight, as well as several high quality independent shops and boutiques. Other national multiple retailers include Boots, WHSmith, Costa Coffee, Dorothy Perkins, East, Laura Ashley Home, Carphone Warehouse, Pizza Express, Ask and Brasserie Gerard.

Marlborough also has several unique shops including a Jigsaw Shop and Landmark outdoor clothing have recently opened their second store in the UK in Marlborough.

- 5.206 Service and leisure uses in the town are also above the national average, representing just under half of all units in the town. There is a high proportion of retail services including opticians and dry cleaners, and a high number of hotels and guest houses, restaurants, public houses and clubs. These restaurants and public houses are dispersed along the length of the High Street and along The Parade and are generally of a good quality. There is a below average representation of cafes, bars and fast food takeaway units. Other uses in the town include a tourist information centre and a library. The town also host a range of cultural and sporting events throughout the year including the Feast of Food festival in October and the Marlborough Spring Fair in Marlborough College, the annual Marlborough International Jazz Festival, the Marlborough Open Studios in July where artists open their studios to the public and the Barbary Castle Horse Trials held in July.

Vacancies

- 5.207 Marlborough has traditionally been a strong location for retailers and vacancy levels have been low. In July 2009, the Council's survey data recorded 12 vacant units, 4.36% below the national average. Synonymous with national trends Marlborough experienced an increase in vacancies at the end of 2008/beginning of 2009, as several retailers fell victim to the recession. Woolworths, Marks and Spencer Simply Food and Wine Rack have closed, as well as the independent Ducks toy shop. It appears that several new retailers have taken over the vacant units including Landmark outdoor clothing. Dash Clothing is also closed for a temporary period whilst they refit their store, which is a positive sign of confidence in the town centre.

Rental Levels

- 5.208 Retail rental levels in Marlborough were £807 per sq m in 2009 representing a fall of 6% since 2008 when rents were £861 per sqm. This indicates that Marlborough is performing relatively well in comparison to rental levels in competing centres, suggesting that the town has a strong retail and leisure offer.

Retailer Demand

5.209 The Focus database lists 14 requirements from operators seeking representation in Marlborough including five service operators (Café Rouge, Caffè Nero, Lloyds Pharmacy, Coffee No.1 and Pizza Express/Ask/Zizzi); two convenience operators (West Cornwall Pasty Co and Holland and Barrett) and seven comparison retailers (Gary Weber, Barnardos, Card Box with Thorntons, The Works, Culpepper and Blue Cross).

Town Centre Environment

5.210 Marlborough has an attractive shopping environment; historic buildings line either side of the High Street and have been sympathetically converted. The High Street is a Conservation Area and many of the buildings are Listed and more recent piecemeal developments sit with older buildings. Shop fronts are generally well maintained and the environment is clean. The wide High Street means that there is sufficient space for pedestrian and vehicular movements, although the dominance of cars on the High Street does lead to aesthetic conflicts with the historic environment. Conservation issues are of major significance in Marlborough and the historic and architectural character of the town is a major factor when considering any proposals for future development.

Summary

- Marlborough is an attractive market town in north east Wiltshire, with main retail provision located on the wide High Street. The centre has a particularly strong number of comparison and service units, and slightly below average number of convenience units, although this is still quite a strong convenience goods offer. The major supermarket in Marlborough town centre is Waitrose. Vacancy rates have traditionally been low, however due to the recession there is now an above average number of vacancies due to the closure of some retailers. Tesco have planning permission to build an out of centre supermarket and the effect of this store, when open, will need to be carefully monitored in the centre.

Melksham

5.211 Melksham is one of Wiltshire's largest towns (following Chippenham, Trowbridge, Devizes, Warminster and Marlborough) and is situated 12 miles east of the City of Bath, 7 miles south of Chippenham and 8 miles west of Devizes, and also lies on the

River Avon (Bristol Avon). The general townscape benefits from traditional building types, generally of between two and three storeys with larger, more modern units toward the north of the town centre. The Wiltshire 2026 consultation document (2009) identified that Melksham town centre is need of regeneration.

- 5.212 The town is located on the A350 route, which links the town to Trowbridge in the south and Chippenham in the north, and also lies on the routes to Calne in the north east and Devizes in the east. Melksham train station lies on the Great Western Railway and operates two trains per day to the centres of Chippenham and Trowbridge. Bus services connect the centre to Bath, Chippenham, Corsham, Frome, Devizes, and Trowbridge. A long distance coach runs once a day and provides connections to London Heathrow airport and Victoria coach station

Accessibility

- 5.213 There are several car parks within the town, many serving supermarkets. The public car parks provide capacity for around 400 car parking spaces, and these are distributed across 6 car parks, all of which are at ground level and located behind the retail frontages, with the exception of on-street car parking at Market Place and a small car park next to residential dwellings on Union Street.
- 5.214 There are ample areas for pedestrian movement within the town centre, although very limited green open space is contained within the centre. Pedestrian crossing points and wide pavements ensure safe and pleasant pedestrian movement, although the centre can become noisy at peak times when traffic movements are at their highest along Bank Street (A3102).

Diversity of Uses

- 5.215 The town's retail composition is illustrated at Table 5.15 below, which is based on survey information provided by Wiltshire Council (November 2008 survey). The town's comparison retail offer is dispersed around the centre, but is largely focused along Bath Road / High Street. The two key multiple retailers in the centre are Superdrug and Peacocks and, overall, the town benefits from a good comparison retail offer with a broad mix of retailers providing a good range of goods including a strong representation in antiques, furniture and DIY, electrical, healthcare, sports and leisure, and florists and pets. There are an above average number of charity shops in

Melksham. There are no footwear retailers in the town centre, and a limited range of retailers selling ladieswear and menswear.

Table 5.15: Melksham Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	12	57	108	15	192
Percentage of Total (%)	6.25	29.69	56.25	7.81	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-1.41	+0.28	+21.02	-2.05	N/A

Source: Experian Goad Category Report, August 2009 and Wiltshire County Council Environmental Services Department, November 2008 Survey.

- 5.216 The town is well served by convenience retailers, with several national multiple retailers present within or on the edge of the town. The largest of these retailers is the Sainsbury store located off Bath Road to the north of the town centre. This store provides a delicatessen, bakery, fishmongers and a butchers counter, along with a range of comparison goods including clothing, housewares and books, DVDs, CDs and a small seasonal range.
- 5.217 Waitrose have recently opened (Spring 2010) in the former Somerfield store located to the west of the Sainsbury's. Pedestrian access to the store is provided from Bath Road via small retail units, whilst customer car parking is provided at the rear. This store also provides a fish, meat, cheese and delicatessen counter and was observed as being quiet at the time of survey; this may be to be expected given the limited time that this store has been open.
- 5.218 There is a also a small Iceland store situated within the Avon Place shopping parade at the centre of the town, which benefits from close proximity to the public car park to the rear (west). Further to these large-format multiple convenience retailers there is also a limited range of small-format independent retailers in the town.
- 5.219 In addition to the town centre convenience retail offer, an Aldi foodstore is located on Beanacre Road to the north of the town centre, which opened in 2008 and is situated next to a McDonalds drive-through restaurant. The store was observed as being quiet at time of survey, as was the other out-of-centre convenience foodstore

near Melksham; the Co-op at Blackmore Road is small scale and serves the immediate residential area.

Vacancies

- 5.220 The November 2008 Council survey found 15 vacant units within Melksham town centre, which is below the national average, and a low vacancy rate for a town of this size, and whilst there are no particular concentrations or patterns to the distribution of vacancies, there are some notable vacancies such as the carpets and flooring unit on Bank Street. We understand that since our site visit the former Woolworths store on the High Street is no longer vacant, and is now occupied by Poundstretcher. The size of vacant units varies from 60 sq m to 560 sq m, and very few units appear to have been vacant for a long period of time.

Environmental Quality

- 5.221 Melksham has benefited from investment in the public realm in recent years, evidenced by the pleasant pedestrian areas that provide seating areas, planting and good signage. The High Street / Bank Street area were observed as being noisy and busy given the volume of traffic passing through the town at peak times. Generally, the town centre is a clean, safe and vibrant area with the majority of pedestrian activity observed between the High Street and Bank Street areas. Significant vehicle and pedestrian movements were particularly observed at the intersection of High Street, Bank Street and Church Street, which is most likely as a result of people accessing the large car park to the west of properties of Bank Street. The Bath Road junction leading to the north, Sainsbury's, Waitrose and the town centre was also observed as being busy at times.

Development Opportunities

- 5.222 Over recent years, significant development has taken place to the north of the town, such as the East Melksham Urban Extension, which is generally more intensive in nature. The large car park to the rear of Avon Place accessed from Church Street serves the Avon Place shopping parade, which is situated at the heart of the town centre. There may be the opportunity to intensify car parking in this location and deliver additional retail floorspace at the Avon Place parade as there are currently some vacancies in this prime location, which could be better developed to provide

modern, large format premises to attract additional multiples to the town. In addition there are several buildings of lower architectural merit around the centre and north of the town that may provide the opportunity for redevelopment under the right economic circumstances.

Edge/Out-of-Centre Retail Provision

5.223 In addition to the two large supermarkets in Melksham town centre, a Lidl supermarket has been developed in an out-of-centre location. Situated to the north of the town centre, the Lidl store which is built to a standard format and provides a customer car park. This store is not well connected to the town centre, linked only by the Bath Road Bridge. An Aldi store, with a sales area of 932 sq m, is located to the north of the town off Beanacre Road, which sits to the south of the large Leekes department's store which is located further north along Beanacre Road. The large out of centre store has a sales area of 11,365 sq m and sells a range of goods including outdoor equipment, electrical items, furniture and kitchenware.

Summary

- The town of Melksham comprises a range of building types, with traditional buildings in the centre and larger modern stores to the north of the town centre. Comparison and service units form the predominant provision of units, with a representation of antique, florists, charity shops and health and beauty services, although provision of ladieswear and menswear could be improved. We have identified a good provision of convenience retailers in the town including Sainsbury's and Waitrose which opened in Spring 2010 in the former Somerfield unit on Bath Road. Recent investment to the public realm provide some pleasant pedestrian areas, although the roads through the town centre are often busy and can restrict pedestrian movement. There is a continued need for further town centre regeneration in the town to enhance the centre's vitality and viability.

Tidworth

5.224 Tidworth is a market town situated in the east of Wiltshire, just to the east of Salisbury Plain. The town is located approximately 15 miles to the north of Salisbury, 10 miles west of Andover, 24 miles south from Swindon and 26 miles west of Warminster. The town has a large military presence and the army is the largest local employer in the

town. Retail and service units cater to the needs of both the military and civilians and units are dispersed throughout the town including the primary shopping area of Station Road, and secondary shopping areas of Pennings Road and Zouch Market.

Accessibility

- 5.225 Tidworth is well connected to the road network, located on the A338 linking Salisbury to Marlborough. The A303 is only approximately three miles south of Tidworth and Andover is only a 20 minute drive away. Parking is available on street, at the supermarkets and at Zouch Market. Half hourly local buses connect Tidworth to Salisbury, Amesbury and Andover. Buses depart from Station Road and the Zouch Estate.

Diversity of Uses

- 5.226 Retail composition in Tidworth is illustrated in Table 5.16 below. The Council survey of July 2009 identified 69 retail and service units in Tidworth, including approximately 4,956 sqm net retail (convenience and comparison) sales floorspace. Service provision dominates the town centre offer, with 41 of the 69 units providing service uses. Convenience retail constitutes 10.15% of total units and comparison uses are below the national average with only 15.94% of the total units.

Table 5.16: Tidworth Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	7	11	41	10	69
Percentage of Total (%)	10.15	15.94	59.42	14.49	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	2.49	-13.47	24.19	4.63	N/A

Source: Experian Goad Category Report, August 2009 and Wiltshire County Council Environmental Services Department, July 2009 Survey

- 5.227 Tidworth has a good provision of convenience retail, sufficient to provide the surrounding communities needs. The largest foodstore is Tesco on Station Road with a sales area of 2,846 sq m. Tesco opened in 2007 and brought investment to the area, linking to the retail and service units on the opposite side of Station Road. A large car park provides parking for shoppers on site. A Lidl supermarket has also recently

opened at the junction of Station Road and Pennings Road, with a sales area of 986 sq m. The concentration of foodstores in the south of the town is complemented by a Spar convenience store on Pennings Road in the north of the centre.

- 5.228 The Wiltshire Council (July 2009) survey states there are only 11 comparison units in the town which are limited and generally provide lower order goods. Our site visit in August 2010 identified three charity shops, a card and gift shop, two computer stores, a florist, a photographers and two military variety stores. Most comparison stores are located along Station Road. There is a poor representation of clothing stores for ladies wear and menswear, toiletries, cosmetics and beauty products, chemists and furniture stores. These stores are generally run by independent retailers, with a strong focus on provision of army goods and supplies for military personnel. The low proportion of comparison units in Tidworth reflect the centre's function as a Garrison town, heavily focused on convenience and service units.
- 5.229 Service units represent just under half of all the units in Tidworth. The majority of service provision is leisure service provision, including nine takeaways, two restaurants, a public house and a sandwich bar. Other services in the centre include a Post Office, Lloyds TSB bank, six hairdressers, a betting shop, a dry cleaners and a financial advice shop. The quality of this provision is generally poor, with a focus on discount prices rather than quality.

Vacancies

- 5.230 The Council's 2009 survey found 10 vacant units in Tidworth which is 4.63% above the national average. During our site visit in August 2010 we found the number of vacant units had not changed which is likely to indicate that these units are difficult to let.
- 5.231 There is a high concentration of vacant units at Zouch Market which appear to have been vacant for some time and are of a poor quality. Zouch Market is located in the Zouch Estate to the west of Pennings Road. In this less central location, the shops have low pedestrian footfall, as shopping trips in the centre are focused around the shops and facilities on Station Road.
- 5.232 Despite being the location of the main shopping activity, there are also a high proportion of vacant units on Station Road. Vacant shops on Station Road appear to have been more recently occupied, and one vacant unit has been sold and at the

time of the site visit was in the process of being renovated. A high turnover of retailers has previously been identified as a problem for units on Station Road and it appears that this is still the case. Increased footfall in this area of the town due to the development of Lidl and Tesco has not managed to lower the vacancy rate in this part of town. The presence of these retailers does not appear to have encouraged other stores to lease these vacant units.

Town Centre Environment

- 5.233 Station Road provides a modern shopping environment, with good pedestrian crossings, wide pavements and new paving. In the summer months cafes provide outside table and chair areas. Retail units on the south side of the street adjacent to the Tesco development are modern with larger store formats. On the north side of Station Road, there are older buildings which vary in shop front quality. In this location the centre appears to be clean, quiet and safe.
- 5.234 The four units along Pennings Road are of a lower quality than those at Station Road. The shop units appear to be dated, emphasised by the new adjacent residential development. One of the units is vacant, which adds to the poor facades of the shop fronts. On street parking is available outside the units, however at the time of the site visit parking spaces were all empty.
- 5.235 The appearance of retail units in the town deteriorates further at Zouch Market. Shops are centred around a large car park which was nearly empty during the site visit. Retail units are one storey high on two sides of the car park and the third side has ground floor retail with residential above. The quality of the shops are poor, and unattractive to shoppers. There are many vacant units at Zouch Market which are boarded up or simply empty, adding to the unwelcoming feel of the shopping area. The area is not well maintained and has a feeling of being unsafe. There are certainly opportunities therefore to improve the general environment of the centre and this should be a priority going forward through the LDF period.

Summary

- The town of Tidworth is located in the east of Wiltshire and the centre has a large military presence. Service uses dominate the town centre offer, and convenience units have an above average representation, including Lidl and Tesco stores. The

Tesco development on Station Road has brought physical enhancements and an increase in shop units in the town, although some of these units are still vacant. These units contribute to the overall vacancy rate in the centre which is high. There is a deficiency in comparison retail provision, which is significantly below the national average. Comparison units in Tidworth provide lower order goods and military provisions. Service units are generally of a lower quality than those in other Wiltshire centres, and there is a distinct lack of leisure provision in the centre.

Warminster

- 5.236 Warminster is located in the west of Wiltshire, and lies in close proximity to Frome (west) and Westbury (north). The centre is by-passed by the A36 and lies on the River Were and also benefits from a train station linking the town to the wider rail network to Bristol, Bath, Southampton and Portsmouth. The town is organised along a linear route, including (west to east) Silver Street, George Street, High Street, Market Place and East Street. The majority of retailing within the town is focused along this route, with the exception of retailing on Weymouth Street, which leads to the Morrison's store; the town's biggest retailer. Warminster has fallen within the Javelin retail rankings over the past three years, which could be partly attributable to the economic recession and also due to retail improvements to other centres across the UK. From its position in 2007 at 502nd, Warminster is now ranked 579th.
- 5.237 The draft Warminster Town Plan (2009) identifies a number of focus areas which are the key opportunity areas in the town and guidelines for development are outlined. We understand the Draft Town Plan will be consulted on later in the year. The main focus areas include Silver Street for the development of an Antiques Quarter; George Street for shopfront improvements; High Street for shopfront improvements and mixed use development; Market Place for additional retail development including infill and the potential for reintroducing a market to Market Place; East Street for potential traffic restrictions and widened pavements; Morrisons supermarket car park could potentially create a through-route to enable traffic to avoid the High Street; the former Dents factory has permission for a new supermarket (Waitrose), which is due to be completed at the end of the year, and there is an opportunity to promote linked trips to the centre; and there is also an opportunity for retail development at the Northern Car Park close to Three Horseshoes Mall.

Accessibility

- 5.238 The majority of the centre being flat and offering wide pavements to aid pedestrian and wheelchair movement around the centre. There are several formal pelican/traffic light crossing points around the centre, allowing safe access across the busy road. Bus stops are dotted around the town centre to link to the wider conurbation and neighbouring towns, and the town's railway station provides linkages to the wider rail network.
- 5.239 There are parking restrictions around much of the town centre, and limited opportunities to park in designated car parks situated behind the main retail frontages. There are no areas of pedestrianisation within the town centre, with the exception of Three Horseshoes Walk, The Cornmarket and Chinns Court.

Diversity of Uses

- 5.240 The Wiltshire Council survey of December 2008 found that Warminster contains 263 retail and leisure units, with strong representation from comparison and service sector operators (see Table 5.17 below). 33% of total units are comparison units (86 units), with just 6% comprising convenience retail units. The largest representation in the town comes in the form of service units, which constitutes 52% of town centre units.

Table 5.17: Warminster Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	16	86	136	25	263
Percentage of Total (%)	6.08	32.69	51.71	9.50	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-1.58	+3.28	+16.48	-0.36	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, December 2008 survey

Convenience

- 5.241 The main component of the town centre convenience offer is provided by the Morrison's supermarket located to the rear (south) of High Street and accessed from Weymouth Street, and the Lidl foodstore situated close to the train station on Station

Road. The Morrison's store opened in 1992 and provides a butchers counter, bakery, fishmonger and pizza counter, and comprises a sales area of 2,276 sq m arranged over a single floor. The Lidl store provides 1,164 sq m of convenience sales area, with a small proportion given over to comparison retail sales, and offering a standard range of Lidl goods. This store opened in 1995 and sits adjacent to the Castlemore Retail Park near the town's train station. There is very little other convenience provision within the town centre, with the exception of a few units dotted around the centre.

Comparison

- 5.242 Comparison retailing in the town centre offers a range of goods, with the strongest representation in antiques, electrical and home furnishings, women's clothing and healthcare shops. The antiques, home furnishings and carpets, and flooring retailers are focused within the western end of the town along George Street and Silver Street, whilst charity shops are evident throughout the town centre; representative of a wider trend throughout many centres in the UK in the recession as a result of the prime pitches available following vacation of these units and lack of occupation by retailers. Charities receive an 80% reduction on National Non-Domestic Rates (business rates) and acquire their stock for free, meaning very low running costs.
- 5.243 There are a number of multiple retailers found in Warminster. Retailers include Dorothy Perkins, Boots, Currys Digital, Peacocks, WH Smith, Superdrug, Stead and Simpson and Edinburgh Woollen Mill. These retailers are situated on the High Street and Three Horses Walk. Independent retailers provide an additional retail offer, providing clothing stores, gift shops, stationers, florists and jewellers.

Service and Leisure Uses

- 5.244 Services are distributed around the town centre, with a strong representation within the financial services sector, particularly around the Market Place area of the town. Hair and beauty salons constitute the majority of the service offer in the town. Leisure services in the town centre are below the national average, although the number of cafes, public houses and fast food takeaways are broadly consistent with national figures. An under provision of bars and restaurants in the centre indicates the centre is not currently performing as evening destination. Other destinations in the town include Warminster Library.

5.245 Cultural facilities and events in Warminster include the Dewey Museum, which is situated opposite Warminster Library and displays exhibitions of local history, the Malting Museum and the Salisbury Plain Museum. Longleat Safari Park and Center Parcs (Longleat) is situated approximately 15 minutes drive from the town centre.

Vacancies

5.246 The December 2008 Council survey found that the town centre has 25 vacant units, representing 10% of the total town centre units. Vacant properties are concentrated in secondary areas of the town along East Street, with six units lying currently vacant. Within the Primary Retail Core and other secondary areas of retail at George Street and Silver Street there are few vacancies, however evidence of refurbishment and upgrade of premises in this area was observed.

Environmental Quality

5.247 There are limited formal areas of open space throughout the town centre, but footpaths are well maintained, complemented by street furniture, seating areas, planting and hanging baskets and clear signage throughout the town centre. The presence of the road running through the centre of the town can introduce a noisy and polluted feel to the town centre at peak times, but at other times the road provides activity in the town, and with the aid of loading bays and shared surface areas the road is well separated from the pedestrian pathways.

5.248 Arcades throughout the centre provide calm, clean and sheltered areas within the centre, and in the case of the Three Horseshoes Walk and the Cornmarket these lead to a large car park to the north of Market Place.

Development Opportunities

5.249 Within the Commercial Area Boundary there are areas of the town that would benefit from rationalisation and a comprehensive approach to delivering modern retail units. A site that has previously been identified, and remains a development opportunity is the Dents manufacturing site adjacent to the retail park in the north. Indeed, in October 2009, an application for a Waitrose foodstore at the site was granted permission for 1,147 sq m net sales area, and it is likely that the new store will be completed by the end of the year. We also understand that Morrisons are keen to

extend their foodstore, and that a planning application has previously been refused, with a revised application likely to be submitted.

- 5.250 We understand that a Draft Town Plan for Warminster is being prepared, ready for consultation later in the year. This includes proposals for the Central Car Park area to the north of the Cornmarket. The development of this site could in turn help to deliver improvements to the retail offer and provision of new, larger format stores adjacent to the Three Horseshoes Mall. The development of this site could also potentially provide additional car parking in this area to provide a tighter focus for the town centre, linking this to the train station, Lidl store and retail park to the north.

Edge/Out-of-Centre Retail Provision

- 5.251 The **Castlemore Retail Park** is situated to the north of Warminster town centre, adjacent to the Lidl store and to the south of Warminster railway station as mentioned in the above section. The retail park was developed in 2006 and includes an Argos Extra, Carpetright, Focus DIY and Garden Centre and a Poundstretcher Extra, with unit sizes range from 557 sq m to 2,530 sq m. The retail park has approximately 150 car parking spaces, but is also easily accessible by foot. The retail park lies opposite the Dents manufacturing site, and is in easy walking distance of the town centre which encourages linked trips. The retail park has a relatively modern appearance is appears to be well maintained.

Summary

- Retail uses in Warminster are located in a linear formation along a busy main road and designated car parks are located behind retail frontages. There are a strong representation of comparison and service units, and a below average number of convenience units. The two major supermarkets in the centre include Morrisons and Lidl. Vacancy rates are broadly in line with the national average. The pavement areas are well maintained, although the linear road layout provides limited areas of formal open space. Planning permission was granted in 2009 for a new Waitrose adjacent to Castlemore Retail Park, which when constructed will enhance the convenience offer in the centre.

Westbury

5.252 Westbury town centre is situated around 18 miles south east of Bath, and 5 miles to the south of Trowbridge town centre. The A350 (Haynes Road) runs through the town, which experiences significant levels of traffic at peak times through the day. However, much of the traffic is routed around the town centre to ensure that the centre is predominantly a safe and quiet environment within which to shop. The main retail provision is concentrated to the east of Haynes Road along Edward Street and High Street. The town centre has slipped considerably within the Javelin Venuescore retail rankings since 2007, from 728th to 1,247th at 2009 which indicates that the centre has struggled to remain competitive with competing centres.

Accessibility

5.253 The town benefits from good road connections via the A350 linking the town to Trowbridge in the north and Warminster in the south. The town's railway station is situated to the north west of the town centre and is located at the intersection between the London to Exeter and the West Country to South Wales lines. There are three public car parks around the town centre, providing around approximately 150 car parking spaces, in addition to the car park serving the Morrisons store and controlled parking zones around the town centre. Access via car is very easy, and there are a good range of bus services operating between the town and the wider conurbation and other centres.

5.254 Pedestrian movement is good within the town centre, particularly around the High Street area of the town, which is pedestrianised and the Market Place, which benefits from shared surface car parking and is one of the quieter elements of the town.

Diversity of Uses

5.255 The town's retail composition is illustrated at Table 5.18 (below), which is based on survey information provided by Wiltshire Council (December 2008 survey data). The town centre comparison retail offer is slightly below the national average, but is comprised of 36 retail units and includes a broad range of comparison retailers. These are generally independently operated but the provision is complemented by several multiple retailers including four charity shops and a Boots the Chemist.

Table 5.18: Westbury Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	7	36	83	16	142
Percentage of Total (%)	4.93	25.35	58.45	11.27	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-2.73	-4.06	+23.22	+1.41	N/A

Source: Experian Goad Category Report, August 2009 and Wiltshire County Council Environmental Services Department, December 2008 survey

- 5.256 The town's convenience offer comprises seven retail units, which represents 4.93% of the town's retail composition, slightly below the national average. The Morrison's superstore is the largest convenience store in the town (sales area 1,386 sq m) located at the centre of the town on Edward Street with its own customer car park, which opened recently following the closure of the old Cooper County Store, comprising a fishmonger, bakery, butcher and delicatessen section. However, this was observed as not being busy during the time of health check survey. Additional convenience provision is comprised of independent retailers and is relatively small-scale in nature.
- 5.257 The provision of service units within the town represents over 58% of the town centre offer, which is significantly above the national average and dominates the town centre offer within Westbury. The dominant elements within the town's service provision is within hair / beauty salons, A3-5 uses such as cafes, restaurants and takeaways along with public houses. Estate agents are also well represented in Westbury as well as other financial and professional services. The quality of the service provision is generally good in areas around the Market Place, although there is a lower standard of provision in the areas around the High Street and Edward Street.
- 5.258 There are no bars, cafes, cinemas, theatres or sports/fitness facilities identified within Westbury town centre, indicating a significant gap in leisure provision in the centre.
- 5.259 According to the information provided, the town currently has 16 vacant retail units, representing 11.27% of overall units in the town centre, which is broadly consistent with the national average.

Vacancies

5.260 The Council's 2008 survey found that there are 18 vacant units spread evenly around the town centre, with the highest concentration focused around the High Street area of the town. The number of vacant units in the town is above the national average at 11.27%. Ordinarily the presence of around 10% of vacancies are sustainable and allow turnover of businesses within a town, and the fact that these are not focused within a particular area of the town centre suggests that the current vacancy rate of only 1.41% above the national average is not a cause for concern within Westbury.

Environmental Quality

5.261 There are elements of the town centre that have benefited from investment and maintenance in recent years, providing high quality, safe and clean areas, particularly around elements of the High Street and Market Place. There is some evidence of graffiti in other parts of the town, but this is not evident across the majority of the town centre. The High Street was developed in the 1970s and in comparison with the Market Place the quality of the environment here is particularly lower. Within those elements of the town centre located away from the A350 and other major roads the environment is observed to be quiet and pleasant. Traffic is routed around these areas, which can add a noisy and polluted element to the town, but this is only normally experienced at peak times.

5.262 As a result of orientation of some units, such as to the north of High Street, there are areas of servicing and the rear of properties, which limit the current scope for natural surveillance around some parts of the town.

Development Opportunities

5.263 The town centre is dispersed around a wide area considering the scale of the retail offer. This dispersal creates gaps and inefficient uses of land between the retail offer, which could be more effectively and intensively developed in the interests of rationalising and focusing the town centre. Further work will need to be identified by the council to identify opportunities and deliver benefits to the town.

Edge/Out-of-Centre Retail Provision

5.264 In Westbury there is one out-of-centre foodstore. A Co-op foodstore is situated just off Bitham Park on Kingfisher Drive, to the north east of Westbury town centre. The store has a net floorspace of 865 sq m, opened in 1994 and provides a customer car park.

Summary

- In Westbury, over half of the units are occupied by service units. This high proportion of service retailers results in a poor mix of retail units, with the number of convenience and comparison units below average, with only one major supermarket, Morrison's. Vacancy levels are also broadly in line with the national average. The majority of the traffic is routed around the town centre, resulting in a quieter shopping environment which is separated from the surrounding residential areas. The quality of the environment is varied, with high quality buildings that are generally well maintained in the north and dated, poorly maintained buildings on the High Street. Units are dispersed throughout the centre, creating gaps in the retail offer which should be addressed to improve the health of retail uses.

Wootton Bassett

5.265 Wootton Bassett is situated on the north east edge of Wiltshire, lying to the south of the M4 and to the south west of Swindon approximately five miles away. The town has become well known for its repatriation ceremonies for British troops killed in Afghanistan where local people stand along the High Street to pay their respects. Retail and service uses in Wootton Bassett are located along the High Street, which although is a busy main road, is an attractive and traditional street, which links through to the modern Borough Fields Shopping Centre which comprises a number of purpose built units around a pedestrianised square.

Accessibility

5.266 The main area of car parking in Wootton Bassett is the Borough Fields car park which is located to the rear of Sainsbury's. There is also a small car park to the rear of Somerfield and there are free parking spaces along the High Street for short stays. Buses run to the larger towns of Swindon, Devizes and Chippenham, as well as to smaller outlying villages although frequency is limited.

Diversity of Uses

5.267 The retail composition of Wootton Bassett is illustrated in Table 5.19 below. The Council's most recent survey of Wootton Bassett (December 2007) indicates that there is a total retail floorspace of 5,270 sq m net comprising 60 convenience and comparison units. The figures indicate that Wootton Bassett has a relatively good mix of uses, with an above average comparison and service offer and a below average convenience and vacancy level.

Table 5.19: Wootton Bassett Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	10	50	82	10	152
Percentage of Total (%)	6.58	32.89	53.95	6.58	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	-1.08	3.48	18.72	-3.28	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, December 2007 survey

5.268 Wootton Bassett's convenience offer includes a Sainsbury's store (1,079 sq m net) located to the rear of the High Street, which anchors the Borough Fields Shopping Centre. There is also a Somerfield (428 sq m net) and an Iceland (605 sq m net) located along the High Street. There is also a farmers market held on every fourth Saturday of the month. The convenience offer is below the national average, but is enhanced through independent bakers and butchers.

5.269 In terms of the non-food offer, several national multiple retailers are present including Peacocks, Lloyds Chemist and Boots, as well as several banks and building societies. Comparison retailing in Wootton Bassett is strong, and there is a particularly high proportion of charity shops, hardware stores, florists and newsagents in the centre. Clothing retailers, including women swear and menswear are below the national average, and increased provision would enhance the offer of the centre.

5.270 Wootton Bassett has a strong representation of service uses (82 units) including high proportions of public houses, restaurants, health and beauty salons, banks and estate agents. Restaurant and café provision is dispersed along the High Street, and units appear to be of good quality. There are several cultural destinations and events in Wootton Bassett including the Wootton Bassett Museum, located on the south of the

High Street and the Annual Carnival. Other nearby destinations include Bowood House and Gardens, Pound Hill Gardens and Wootton Bassett Historical Society.

Vacancies

- 5.271 At the time of the Council's survey, there were three vacant retail units and seven vacant service units in the centre. It would appear that the number of vacant units has decreased since December 2007 and there are now six vacant units scattered along the High Street and in Borough Fields. Other uses include a library located in the Borough Fields development and a museum which is located in the half timbered 17th Century Town Hall, which is perhaps the most notable landmark building along the High Street containing an extensive photographic record of Wootton Bassett life in the 19th and 20th Centuries.
- 5.272 Wootton Bassett has a low number of vacant units for a town of its size. The current number of vacancies is 3.28% below the national average. The vacant units that are in the centre are evenly dispersed along the High Street.

Town Centre Environment

- 5.273 The quality of the town centre environment in Wootton Bassett is generally good, benefiting from a wide High Street flanked by the presence of attractive buildings, many of which date from the Georgian period and have been sympathetically adapted to accommodate modern shops, houses and offices and which appear to be well maintained. However, there are several vacant units in prime locations along the High Street which detract from the attractiveness of the centre. Traffic flows are also heavy although this does not impede pedestrian movement.

Development Opportunities

- 5.274 The Focus database lists two requirements from retailers looking to locate in Wootton Bassett; Greggs is seeking between 74 sq m and 121 sq m and there is a requirement from a coffee shop operator for between 121 sq m and 232 sq m. The re-occupation of vacant units to accommodate these retailers is likely to form the most way of accommodating these requirements.

Summary

- Wootton Bassett is a town in north east Wiltshire which provides retail and service units along a traditional busy High Street. Borough Fields Shopping Centre is also located in the centre which also provides an open square for shoppers. Wootton Bassett has a good representation of comparison and convenience units, including a Sainsbury's supermarket. The level of vacancy rates is below the national average which indicates that the town is performing strongly. Overall the environment of the centre is good and the busy traffic on the High Street does not severely restrict pedestrian movement.

Smaller Villages

Downton

- 5.275 Downton, one of the smallest local centres forming part of this study, is in keeping with the excellent environmental quality and English village environment common throughout the area. Downton is located approximately six miles south of Salisbury city centre. The village is split into three separate frontages interspersed with cottages and countryside. Retail and service provision in the centre is distributed throughout, with key areas including The Headlands (A338), The Borough and High Street.

Accessibility

- 5.276 Downton is located adjacent to the A338, connecting Fordingbridge, Ringwood and Bournemouth in the south to Salisbury to the north. This is a key route for traffic into Salisbury and at times is very busy. Parking is available on street, and approximately 17 designated spaces are allocated outside the Co-op food store, and a larger car park to the rear with space for 50 vehicles. This appeared quiet on the day of the site visit. A specific bus service between Downton and Salisbury runs approximately every 90 minutes with the X3 between Salisbury, Fordingbridge, Ringwood and Bournemouth and stopping at Downton running every 30 minutes at peak times.

Diversity of Uses

- 5.277 The most recent Council survey of August 2009 found that there are only 27 units in Downton, making it the smallest village centre in the district. The retail composition of Downton is illustrated in Table 5.20 below. Retail units (convenience and comparison) in the village comprise approximately 600 sq m net sales floorspace. The centre's

retail offer comprises a good provision of convenience and service units and a below average comparison goods provision.

Table 5.20: Downton Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	5	5	16	1	27
Percentage of Total (%)	18.52	18.52	59.26	3.70	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	10.86	-10.89	24.03	-6.16	N/A

Source: Experian Goad Category Report, August 2009 and Wiltshire County Council Environmental Services Department, August 2009 survey

5.278 The largest unit is the Co-op foodstore with a floorspace of 371 sq m, a purpose built unit located on The Borough which also provides a cash machine. During our site visit in August 2010, we identified an additional four convenience retailers. These retailers comprise a Spar, a Newsagents, a bakery and a speciality foods store. The representation of convenience retailers is 10.86% above the national average, indicating that Downton provides a good provision for top up food shopping.

5.279 The provision of comparison retailers is rather limited in Downton, which is usual for a village of this size in close proximity to a main centre; main comparison shopping needs are catered for in the nearby city of Salisbury. Comparison units in our site visit in August 2010 included a bathroom store, a kitchen store, a pet shop, pharmacy and Post Office. The highest proportion of units in Downton are occupied by service businesses which represent 59.26% of all units (24.03% above the national average). Service units include Lloyds TSB bank, three hairdressers, three public houses, two hotels/guest houses, an opticians, a beauticians, a cake makers and takeaway and are generally of a good quality. Further facilities in the village include a library, doctor's surgery and a leisure centre.

Vacancies

5.280 Only one vacant unit was identified on the High Street in the Council survey in August 2009. This represented a vacancy rate of 6.16% below the national average, particularly strong for a village of this size. During our site visit in August 2010, we

identified that this unit has since become occupied by Spar and is currently trading. On this basis, there are now no vacant units in the centre. This indicates that the village is healthy and performing well as a local shopping and service destination.

Town Centre Environment

5.281 Retail and service provision is divided into three distinct areas in Downton, which are linked by areas of residential. The High Street in the east of the village is characterised by traditional brick built buildings and thatched cottages, providing a mixture of comparison, convenience and service uses. The environment is of a high quality and is well maintained and is separated from the other retail provision by the River Avon which runs from north to south. In the centre of the village is The Borough, which provides the key retailers Co-op and Lloyds TSB. These units are a combination of traditional brick buildings, as well as more modern units. A zebra crossing at this location improves access between shops for pedestrians. There is attractive planting, benches and bins in this location. Further west is the Headlands which is a less attractive area than the rest of the village, in part due to the loss of character due to the busy A338 which runs along this road.

Summary

- Downton is one of the smallest villages identified in this study, and is situated towards the south east corner of Wiltshire. Downton is located on a key route between Salisbury, Ringwood and Bournemouth, and at peak times traffic is very heavy. Similar to other villages of this scale, comparison retail is under represented, and service and convenience stores provide the main uses in the centre. Unit provision is separated into three distinct areas, which are separated by areas of residential. This adds to the rural charm of the village, but also affects the legibility of the centre.

Mere

5.282 Mere is an attractive village located in the south west of the district, close to the Cranborne Chase and West Wilshire Downs Area of Outstanding Natural Beauty. The village lies approximately 23 miles west of Salisbury and 20 miles south of Trowbridge. It is situated on the A303. The village is easily accessible to other centres outside of Wiltshire such as Wincanton and Frome, along the A303 and Gillingham (Dorset).

Shops and services in the town are clustered around the Square and Clock Tower around Salisbury Street, Church Street and Castle Street.

Accessibility

5.283 Access to the road network in Mere is good due to the close location to the A303, a key route between London and the West Country. There are two main car parks on Castle Street and Salisbury Street which provide approximately 78 spaces. On street parking is also available. Public transport services are typical for a village of Mere's size with there being no railway station in the village so the main public transport to larger towns such as Shaftesbury, Gillingham and Yeovil is provided by buses.

Diversity of Uses

5.284 The most recent Wiltshire Council survey of Mere in August 2009 indicates that the village has approximately 43 retail and service units, as illustrated in Table 5.21 below. There are four convenience units and seven comparison units. The town also has a high number of service uses (28 units) including several public houses, hairdressers, restaurants, takeaways, estate agents and Lloyds TSB. Mere's convenience offer includes a co-op, a greengrocer and a butcher.

Table 5.21: Mere Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	4	7	28	4	43
Percentage of Total (%)	9.30	16.28	65.12	9.30	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	1.64	-13.13	29.89	-0.56	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, August 2009 survey

5.285 For a village of this size there is a relatively good mix of retail and service uses. The high proportion of service uses represents the village's local service provision. The Co-op is small in scale and performs a top up shopping role. National retailers and service providers in the town include the Co-op, Lloyds TSB and Kia. Other key retailers in the town include the Indigo Blue Indian Restaurant and Yapp Brothers Wine Merchants. Mere also boasts other facilities that are unusual for a small village. These

facilities include a library, museum, information centre and doctors surgery. From our observations, Mere appears to be trading well and is a relatively healthy local centre.

Vacancies

5.286 The Council survey of August 2009 found that there were four vacant units in the village, slightly above the national average. Our site visit in August 2010 found that the number of vacant units in the village has now decreased to two, indicating that the centre is performing well despite the economic situation. One of the vacant properties, the former antiques store, has only been vacant since December 2009.

Town Centre Environment

5.287 The village centre environment of Mere is of a high standard. The Square is an attractive shopping environment, with public seating, bins, hanging baskets and planting adding to the appearance of the village. The village is clean and well maintained, and shop frontages are of a good quality. A zebra crossing on Salisbury Street enhances the pedestrian environment, although the roads in the village did not appear to be too busy during the site visit.

Summary

- Mere is a very attractive village located in the south west of Wiltshire. The village is centred around the square, which provides a relatively good mix of uses, including a Co-Op. Comparison retailing is below the national average, although this is to be expected for a village of this size. Mere caters for local needs and with a low proportion of vacancies appears to be trading well.

Pewsey

5.288 Pewsey is a small town that retains its traditional village charm. Located at the centre of the Vale of Pewsey to the south of Marlborough, it has a train station on the mainline to London Paddington making it a popular location with commuters. It is in a rural location halfway between the A303 and M4 motorway, although some distance from both. Shops and services in Pewsey are crucial for serving the local population, particularly less mobile people, given the rural nature of the surrounding area.

Diversity of Uses

5.289 The retail composition for Pewsey is illustrated below in Table 5.22. The most recent survey information for Pewsey (July 2009) provided by the Council indicates that there are 28 retail units including seven convenience units and 21 comparison units. There are 48 service units and 11 vacant service units. Pewsey's retail offer is complemented by a farmer's market held on the second Thursday of every month and the Pewsey Country Market which is held every Tuesday morning in the Bouverie Hall car park.

Table 5.22: Pewsey Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	7	21	48	11	87
Percentage of Total (%)	8.05	24.14	55.17	12.64	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	0.39	-5.27	19.94	2.78	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, July 2009 survey

5.290 Pewsey's retail offer is located along the High Street and North Street. Shops and services occupy converted ground floor units and are interspersed with residential uses. The largest retail unit in the town is the Co-Op (sales area 948 sq m net), which is a purpose built store located behind the High Street, followed by Woottons of Pewsey, an independent hardware and garden supplier. Other retailers in Pewsey include Boots, Martins newsagents, Lloyds TSB and various independent retailers. Pewsey is an attractive town which benefits from visitor trade throughout the year and there are shops and services which will rely on visitors and tourists such as gift shops, cafés and tea shops. Other uses in Pewsey include a Heritage Centre, mobile library, local police station, fire station and sports centre complex with a swimming pool.

5.291 There is a lack of published information on rental levels and retailer demand in Pewsey, but our observations indicate that the centre is healthy with several new retail units opening such as the Tale of Spice Indian restaurant and takeaway.

Town Centre Environment

5.292 Pewsey's main car park is the North Street car park but there are also parking spaces along the streets and the Co-Op has a customer car park. There is an attractive, well

maintained bus stop along North Street with local bus services running to outlying towns and villages as well as to Salisbury. Pewsey is an attractive centre and is clean and well maintained with shop fronts generally good although several are historic and dated, although this adds an element of charm and character to the centre. Most of the buildings along High Street and North Street are two/three storeys and many have traditional thatched roofs and half timber frames. The presence of the River Avon through the town and statue of King Alfred also contribute to the town's character.

Summary

- Pewsey is a small centre, with service uses dominating the retail offer reflecting the local nature of the centre serving local community needs. Convenience retailing is enhanced through a Co-op supermarket, and the number of convenience and vacant units are both close to the national average. Pewsey retains its traditional village charm and shop fronts are generally in good repair.

Tisbury

5.293 The large village of Tisbury is located in the south west of Wiltshire, approximately nine miles to the east of Mere and 14 miles to the west of Salisbury. Tisbury is a traditional local service centre in a rural location, within the Cranborne Chase and West Wilshire Downs Area of Outstanding Natural Beauty. Units in the village are set out in a linear pattern along a traditional High Street, also forming a hill sloping from north to south.

Accessibility

5.294 Tisbury is cut off from the major road networks, but is approximately 4 miles from the main roads A350 and A303 providing access to Shaftesbury. Salisbury is a 30 minute drive away on country roads. Despite the rural location, Tisbury is easily accessible by public transport with a rail station on the Exeter to Salisbury line, providing local connections and a route to central London and the South West. Local bus services also link Tisbury to Salisbury, Shaftesbury, Gillingham and Hindon and the successful Tisbus serves Tisbury and its surround parishes with an on-demand bus service.

5.295 There are approximately 53 car parking spaces in a car park just off the High Street at The Avenue. On street car parking is also available on the High Street, which is free for 1 or 2 hours. On street parking seems to be popular and during the site visit there was limited availability. The historic, narrow street layout, combined with on street

parking provision leads to problems with congestion. This was particularly apparent during the site visit, when deliveries for the Co-op foodstore led to stationary traffic.

Diversity of Uses

5.296 The Wiltshire Council survey of December 2007 found that the town centre comprises 34 retail and service units. The retail composition of Tisbury is illustrated in Table 5.23 below. There is a good representation of all uses, with a particularly strong convenience goods sector with five units (7.05% above the national average). There are 11 comparison and 15 service units which is also above the national average, and three vacant units in Tisbury, slightly below the national average.

Table 5.23: Tisbury Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	5	11	15	3	34
Percentage of Total (%)	14.71	32.35	44.12	8.82	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	7.05	2.94	8.89	-1.04	N/A

Source: Experian Good Category Report, August 2009 and Wiltshire County Council Environmental Services Department, December 2007 survey

5.297 Our site visit in August 2010 found convenience retailers in the village include a Co-op store, a butchers, a deli, a confectionary, tobacco and news store (CTN) and a grocers. The Co-op store is approximately 149 sqm and provides an adequate range of products for top up food shopping and is a key anchor for the centre. For a small village these stores provide a good range of convenience goods, adequate in serving the day to day needs of the surrounding rural villages. Comparison retailers include a Boots pharmacy, a women's clothing shop, two gift shops and an electrical store. There is also a diverse mix of service units including a Post Office, an accountants, estate agents, hairdressers and takeaway restaurants. Financial services are limited however the Co-op provides a cash point.

Vacancies

5.298 During our site visit in August 2010 there has been a slight change in the composition of the units since the Council survey of 2007 and now there are four vacant units in

Tisbury. Vacant units are dispersed along the eastern side of the High Street, across a variety of stores. DW Supplies hardware store at the top of the High Street is vacant and in a poor state of repair. In contrast, Ted Martin florists is also vacant, but at the lower High Street at the Square, in a well maintained and attractive stone building.

Town Centre Environment

5.299 The Square at the bottom of the High Street is an attractive centre, with wide streets and a large tree dominating the surrounding stone built traditional buildings. The Square is well maintained is also where the centre's bus stops are located. As you travel north on the High Street, the road inclines and narrows and shops and services are located on both sides of the road. On street parking limits the road to single lane traffic and narrow pavements in this area create pinch points. Pedestrian movement in these areas are limited, and as such there is no provision of seating areas in the town centre. The centre appears to be generally well maintained, although shop fronts at the north of the High Street are of a lower quality than those at the bottom of the centre, and generally sell lower quality goods.

Summary

- Tisbury is a village located in the south of Wiltshire. Tisbury is not located on any major road networks and has a good retail and service provision which caters for local residents. Located on an incline, the High Street provides on street parking which combined with the traditional, narrow, road layout leads to problems with congestion. The diversity of uses indicate that Tisbury is a healthy centre, and the small variety of shops appear to be trading well.

Wilton

5.300 Wilton lies only three miles to the west of Salisbury City centre. Wilton is a historic centre and the main retail and service provision is located in a cluster around the Market Place, on roads including North Street, South Street, West Street and Silver Street. A key tourist destination is the stately home Wilton House which lies on the edge of the town and is open to members of the public.

Accessibility

5.301 Wilton is located close to the A36, a key route linking Salisbury in the south east to Warminster in the west. Through the centre of Wilton is a smaller A Road, the A30 which links Shaftesbury and several smaller villages to Salisbury. The A30 runs along West Street and Silver Street and cuts the centre in two, with heavy traffic flows at peak times. There are approximately 70 car parking spaces at the Market Place and 120 spaces at the South Street car park. There is also a park and ride scheme operating in Wilton to provide public transport into Salisbury city centre. Wilton has no open train stations and residents therefore rely on bus services which operate every 20 minutes and only take 10 minutes into the centre of the town.

Diversity of Uses

5.302 The most recent survey of Wilton undertaken by Wiltshire Council was in August 2009 indicates that the village has approximately 60 retail and service units, illustrated in Table 5.24 below. There are seven convenience units and 17 comparison units. The town also has a high number of service uses (31 units) including HSBC and Lloyds TSB banks, several public houses, hairdressers and cafes. Wilton's convenience offer includes a One Stop shop, a deli, a bakery and a greengrocer. Retail provision in the town is complemented by Wilton Market which is held weekly on Thursdays at the Market Place, close to the ruins of St Mary's Church. Other key facilities in the town include the Wilton art Gallery, Wilton Health Centre and Wilton Library.

Table 5.24: Wilton Retail Composition by Number of Units

Retail Category	Convenience	Comparison	Service	Vacant	Total
No. of Units	7	17	31	5	60
Percentage of Total (%)	11.67	28.33	51.67	8.33	100
National Average (%)	7.66	29.41	35.23	9.86	-
Variant (%)	4.01	-1.08	16.44	-1.53	N/A

Source: Experian Goad Category Report, August 2009 and Wiltshire County Council Environmental Services Department, August 2009 survey

5.303 The information above from the Wiltshire Council August 2009 survey indicates that Wilton was providing a relatively good mix of retail uses. There was an above average representation of convenience and service retailers, and a below average representation of comparison and vacant units. Our site visit of Wilton in August 2010

found that the retail composition has changed and the number of convenience units has decreased from seven to four, service units have decreased from 31 to 18 and the number of vacant units has decreased to four. This indicates that retail and service units have been lost in the town centre.

- 5.304 Convenience goods shopping is provided primarily on North Street. The largest food store is Budgens of Wilton, which also incorporates Post Office facilities. The One Stop shop is located a few units down and is open from 6am to 11pm everyday. Independent convenience goods retailers include Best Bros greengrocers and Reeves the Bakers. Comparison goods shops are dispersed throughout the centre. The top of North Street generally sells lower order goods, including charity shops, takeaways and upholstery stores. Shops surrounding the Market Place are of the best quality in the centre. The market Place is the key retail and service area, with several cafes, a pharmacy, bank and greengrocers. West Street provides a mixture of shops and services, which are generally of a higher quality. Shops here include a florist, a curtain shop, music store, a public house, an art gallery and financial advisors. Only a few units are located on South Street, including a betting office and a library.

Vacancies

- 5.305 Two key multiple retailers in the centre have recently become vacant. The Threshers off license and the HSBC bank, both on West Street are now vacant. The prominent location of these vacant units, particularly the HSBC on the corner of West Street and North Street has a negative impact on the environment. This loss of multiple retailers in the centre should be a cause for concern. There are a cluster of vacant shops on North Street that appear to have been vacant for some time.

Town Centre Environment

- 5.306 The Market Place is the focal point of the town and is of a high quality. The centre has an attractive environment with a number of traditional and historic houses and shop units and mature trees. Recent public realm improvements to the Market Place has resulted in widened pavements, improved pedestrian crossings, seating areas and hanging baskets and has further improved the town centre environment. Away from the centre, particularly up to North Street, the general quality of the shop fronts and buildings deteriorates, with some units in a poor state of repair. Shop fronts vary

in design on West Street, some traditional buildings have been well maintained, whereas other units lower the quality of the environment.

Edge/Out-of-Centre Retail Provision

5.307 **Wilton Shopping Village** is located to the north east of the town centre but is separated from the town and effectively forms an out-of-centre location. The Shopping Village opened in 1998 and is open from 9.30am to 5.30 Monday to Saturday and from 10.30 to 4.30 on Sundays. Wilton Shopping Village is a small factory outlet centre selling items such as furniture and clothing at discount prices. The Centre is an attractive shopping environment, in a riverside location with a restored mill and courtyard, opposite Wilton House and gardens and benefits from free parking. Currently 10 out of the 12 units are trading, and the centre appears to be trading well.

Summary

- Wilton is a small town in Wiltshire comprising 60 units. Retail and service provision is focused in a cluster around Market Place. Wilton is located on a key route to Salisbury and as such heavy traffic can affect the centre at peak times. Retail service provision in the centre is good with two banks and several public houses, however the number of retail units in the centre has declined since the previous Council 2009 survey, with our site visit of August 2010 indicating that retail units having been lost on the centre, which is a position which needs to be monitored carefully. However, overall, the town centre environment is very strong with a number of traditional and historic buildings.

6. Quantitative Assessment

6.1 In this section we estimate the current performance of retail provision in Wiltshire as the basis for forecasting the need for additional retail floorspace to the period 2026, incorporating the interim years of 2015, 2020 and 2025. The capacity tables accompanying this assessment are attached in Appendices 2 and 3. As previously stated, this assessment predominantly focuses on capacity arising Wiltshire's key major centres and market towns.

6.2 We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the household telephone survey of existing shopping patterns to model the existing flow of available expenditure to each centre and identified out-of-centre retail provision. In order to develop the baseline position, we have:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Wiltshire catchment area;
- Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis that the household telephone survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales;
- Compared to the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities in each shopping destination.

6.3 Building on the baseline position, we have explored the capacity for further convenience and comparison goods retail floorspace within Wiltshire.

Data Inputs

Survey Area and Household Survey

6.4 In order to provide detailed factual information on shopping patterns in Wiltshire, we commissioned a new household telephone survey covering 2,800 households. This

number was commissioned to ensure that at least 100 responses were received from each area and is therefore statistically accurate. GVA designed the survey questionnaire in consultation with Wiltshire Council and NEMS Market Research Company – who undertook interviewing and data processing in June 2010. The survey area in relation to the competing centres is shown on Plan 1, whilst Plan 2 shows the study area in detail highlighting the spatial relationship of all of Wiltshire's centres. The full survey results are provided in Appendix 5.

- 6.5 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove certain responses, such as “internet/mail order shopping”, to ensure consistency with categories excluded in the expenditure projections. For convenience goods, the household telephone survey included questions on main foods and top up food shopping. The results of the two types of food expenditure were then merged through the application of a weight, which reflects the estimated proportion of expenditure accounted for by each type.
- 6.6 For food we used a 75%/25% food/top-up food weighting. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey Zone. The survey also includes six questions on specific comparison goods types, which coincides with Experian Business Strategies definitions of comparison goods expenditure. The retail and needs modelling exercise uses the weighted averages of the household survey responses for each goods type based on the proportion of per capita spend on that goods type. This process establishes pattern of residents spending for each Zone in terms of the following types of goods:
- clothing and footwear;
 - furniture, floor coverings and household textiles;
 - DIY and decorating supplies;
 - domestic appliances such as washing machines, fridges cookers and kettles
 - electrical appliances (TV, hi-fi, radio, etc); and
 - personal goods (jewellery, glassware, books, stationary, gardening and pet related products)

Estimates of Population in the Survey Area

- 6.7 Population estimates and forecasts were drawn from the Experian e-marketer in-house system. This provides estimates of population based on trend line projections and the 2001 census for small, localised areas. Overall, the population of the survey area within Zones 1-28 is currently £1,197m. It is forecast to grow to £1,251m by 2015, £1,304m by 2020 and to £1,369m by 2026 (Table 1, Appendix 2 and 3). Overall, the population is forecast to grow by 14.3% between 2010 and 2026 within the whole survey area.

Available Expenditure in the Survey Area

- 6.8 The Experian e-marketer system provides estimates of the per capita expenditure for convenience and comparison goods in 2008 prices. We have made deductions for special forms of trading (SFT) which represent expenditure not available to spend in the shops, i.e. internet and catalogue shopping based on the most up to date information provided by Experian. We have applied individual per capita expenditure figures across each survey Zone to provide a more detailed understanding of available expenditure in different parts of the catchment area.
- 6.9 We have applied growth rates for convenience goods of -2.9% per annum between 2008 and 2009; 0.3% between 2009 and 2010; 0.4% for the period 2010 to 2015; and 0.7% per annum from 2015 onwards. We expect more growth will take place on comparison goods as opposed to convenience goods as the scope to purchase more food is more limited than the scope to purchase non-food goods. We have applied growth rates for comparison goods based on forecast levels of growth set out within Experian (Retail Planning Briefing Note 8.1 Aug 2010) / Pitney Bowes September 2010). We have applied the following projections -0.6% for the period 2008 – 2009; 0.4% for the period 2009 to 2010; 2.5% from 2010 to 2015; 3.6% from 2015 to 2020 and 3.7% onwards.
- 6.10 Taking these considerations into account, we have generated expenditure by Zone to highlight variations across the survey area and grown them accordingly to 2015, 2020, 2025 and 2026; 5 year forecasting periods as required by PPS4. Table 3, Appendix 2, applies per capita expenditure within each Zone to population forecasts, which indicates that total available convenience goods expenditure within the survey area is currently £2,123.3m. This is forecast to grow to £2,239.9m by 2015; £2,407.7m by

2020; and finally to £2,625.1m by 2026. This equates to an overall growth of £501.8m between 2010 and 2026.

- 6.11 Table 3, in Appendix 3 sets out the total available comparison goods expenditure within the survey area under each growth rate scenario by again applying per capita expenditure within each Zone to population forecasts. This indicates that total available expenditure within the survey area is currently £3,530m and this is forecast to grow to £6,597m by 2026. This equates to a much higher level of overall growth; £3,067m in the period 2010 to 2026. This is mainly explained by the growth in population and the stronger increase in comparison expenditure projections estimated post 2015.

Floorspace Data

- 6.12 The comparison and convenience floorspace data used in our modelling has been drawn from a range of data sources including the Institute of Grocery Distribution (IGD), Wiltshire Council's Economy and Environmental Department's monitoring data, Trevor Woods retail warehouse database and Experian Good. Our floorspace assumptions for the foodstores include, where appropriate, an adjustment to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace; we have adjusted the net floorspace to identify the proportion of sales space allocated for convenience/comparison goods in our capacity assessment. This accords with the expenditure data and the expenditure assumptions used.

Convenience Goods Shopping Patterns

- 6.13 Addressing each of the major centres/market towns and out-of-centre provision across the Wiltshire area, we have reviewed shopping patterns and performance of existing convenience goods floorspace. Using the composite market shares derived from the household telephone survey and baseline expenditure estimates, we have calculated the convenience goods turnover of the main convenience provision in the sub-region.
- 6.14 The analysis reviews the performance of the main foodstores identified by the results of the household telephone survey, by comparing each with sales based upon estimates of company average. The survey results can underestimate the turnover of

single stores on the basis that they may not be the regular destination for main food shopping but instead receive a large number of shoppers who visit infrequently which would not be identified by the survey. For example, nationally M&S and Waitrose in particular, tend to be understated. In these circumstances individual forecasts should be treated with caution, and wherever possible should be corroborated by other sources where available.

- 6.15 Overall, the Local Planning Authority (LPA) area's main foodstore draws 29% of available convenience goods expenditure in the survey area (Zones 1-28). Evidently there is a degree of leakage from the catchment area, however, this should not all be viewed as potential expenditure which can be clawed back as undoubtedly there will be stores within centres on the outskirts of the catchment area which are attracting spend from residents from within i.e. places such as Southampton to the south east, Bath to the west, Cirencester to the north and Swindon to the north east.

(i) Performance of Major Centres / Market Towns

- 6.16 Table 6.1 (below) highlights the indicated trader performance of the convenience sector compared to estimated company average sales turnover. This is likely to be largely determined by the performance of the 'anchor' foodstore, and does not necessarily mirror the performance of small independent traders in each centre. A more detailed discussion of each individual centre is set out below which should be read in conjunction with town centre health checks provided section 5 and the catchment area plans.
- 6.17 In total, we estimate that the convenience stores in the three major centres of Salisbury, Trowbridge and Chippenham town centres have a turnover of £98.9m which is below our estimates based on company average sales (£126.1m). It is evident that the stores in Trowbridge town centre are trading slightly above company average levels with an estimated turnover of £39.4m which is consistent with our qualitative findings of the centre, whilst the stores in Salisbury and Chippenham according to the household survey results are trading at below company average levels.

Table 6.1: Current Trading Performance of foodstore provision in the key centres in Wiltshire

Centre/Destination	Turnover from Household Survey Results (£000s) 2010	Expected Company Average Sales (£000s)
Major Centres		
Salisbury	48,142	59,776
Trowbridge	39,400	38,806
Chippenham	11,364	27,492
Sub Total	98,906	126,073
Market Towns		
Amesbury	16,842	10,330
Bradford on Avon	1,781	1,041
Calne	32,945	26,892
Corsham	6,866	8,023
Cricklade	3,102	2,369
Devizes	44,854	52,759
Ludgershall	4,944	5,472
Malmesbury	3,297	2,270
Marlborough	22,223	30,015
Melksham	28,624	35,675
Tidworth	19,530	32,707
Warminster	37,231	30,485
Westbury	8,922	16,672
Wootton Bassett	11,875	17,295
Sub Total	243,038	272,005
Out of Centre		
Salisbury: Out of Centre	98,752	89,295
Trowbridge: Out of Centre	36,330	69,703
Chippenham: Out of Centre	101,935	84,288
Amesbury: Out of Centre	3,846	3,060
Bradford on Avon: Out of Centre	18,558	18,132
Devizes: Out of Centre	3,380	2,745
Malmesbury: Out of Centre	5,631	6,446
Melksham: Out of Centre	5,847	9,301
Westbury: Out of Centre	4,445	6,014
Sub Total	278,726	288,985
TOTAL	620,670	687,064

Source: Appendix 2, Table 7a

- 6.18 On closer inspection of the centres, it is apparent that the several of the stores within **Salisbury City Centre** are performing below expected levels including Tesco and

Marks and Spencer, whilst the Sainsbury's in the Maltings is trading at above company average levels (Table 7, Appendix 2).

- 6.19 As mentioned above, we advise that the baseline turnover estimates for town centre foodstores, as derived from the household survey, should be interpreted with care. For example, it was evident from our audit of Salisbury that the Marks and Spencers store was busy, particularly at lunchtimes, and the Tesco Metro store was also showing signs of good trading levels. The total turnover of Salisbury may also not have taken full account of the turnover generated by the Market, which could add to the overall turnover of the centre.
- 6.20 Overall, we therefore consider that the telephone survey may not have taken account of the full performance and draw of the town centre's foodstores, and specifically their important roles as 'top-up' destinations for shoppers, visitors, tourists and local employees, particularly at lunchtimes. It is widely accepted that these town centre stores operate in such a way and their turnover can often be under-represented in the household survey results. This is not solely confined to the results for the centres in Wiltshire, but can often be the case in all centres surveyed across the Country.
- 6.21 The same caution should be applied to the town centre convenience stores in **Chippenham Town Centre** where the household surveys results indicate that the foodstore provision in the centre is underperforming including the centre's key anchor store; Tesco within the Emerygate shopping centre. However, our site visit confirmed that the store was busy and appeared to be trading well and benefits from its position adjacent to Chippenham's largest car park.
- 6.22 The foodstore provision within **Trowbridge Town Centre** on the other hand, is performing more in line with what we would expect the centre to be trading at. The key anchor foodstore in the centre, Asda appears to be performing strongly, broadly in line with expected company average levels. This is a good level of performance for the store which is facing strong competition from out of centre provision including Tesco Extra on County Way to the south east of the centre. The Asda store is also now facing new competition in the form of the recently opened (July 2010) Sainsbury's on British Row in the north of the town. This store had not opened when the household

survey was undertaken during June 2010, however the floorspace and turnover has been factored in to the assessment as a commitment.

6.23 In relation to the other market towns in Wiltshire, we set out below the performance of each of these below. We have not examined the capacity for the smaller village centres for convenience or comparison floorspace due to the lack of identified market shares for these centres. Their role and function in the hierarchy and scope for further floorspace is dealt with in Section 8.

- **Amesbury Town Centre** has a turnover of £16.8m which is above what we would expect the centre to be trading at based on company average levels (£10.3m). This is almost entirely attributable to the Co-op store on Salisbury Street which is drawing the majority of its trade from its location zone (9). However, we anticipate that the Co-op store will face strong competition from Tesco now that the out of centre store opens to the north of the centre off London Road.
- **Bradford on Avon Town Centre** has a significantly lower convenience turnover than Amesbury with the household survey indicating a turnover of £1.8m for the centre. It is apparent however that this turnover is slightly above what we would expect the centre to be trading at. There is no key anchor store in the town centre which means that its convenience trade comes from a localised area, with 92% of its trade derived from Zone 19. The majority of main food shopping trips in the centre's location Zone (19) are going to the out of centre Sainsbury's off Frome Road to the south of centre.
- **Calne Town Centre** has a turnover of £32.9m which is above what we would expect the centre to be trading at based on company average levels (£26.9m). This turnover is almost entirely attributable to the Sainsbury's and Somerfield stores in the centre. The centre is drawing the main part of its trade (88%) from its location Zone 23.
- **Corsham Town Centre** has a fairly modest turnover of £6.9m which is slightly below our estimate of company average turnover (£8.0m). The Co-op, which was formerly trading as a Somerfield, accounts for all of this turnover and attracts 91% of its trade from its location zone; Zone 21.

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- **Cricklade Town Centre** has a turnover of £3.1m which is slightly above our estimate based on company average levels £2.4m. Being one of the smallest centres in the area the convenience offer is rather limited with the main store in the centre being a small Tesco Express on High Street, which we expect the majority of the centre's turnover to be attributed to.
 - **Devizes Town Centre** has a turnover of £44.8m which is slightly below company average sales turnover estimated at £52.8m. The **Morrison's** store on Eastcourt Street, to the east of the town centre, attracts the majority of trade (£26.4m) and this store is performing above average levels. The centre's other convenience provision is extensive and includes a Sainsbury's, Marks and Spencer foodhall, Somerfield, and Tesco Metro. The centre draws the majority of its trade from its location zone (15) where it attracts 70.4% of the overall convenience turnover, it also attracts trade from adjoining zones 14 (£3.0m), 20 (£1.5m) and 22 (£1.8m).
 - **Ludgershall Town Centre** has a fairly modest convenience offer, in comparison with Devizes, which is reflected in its turnover of £4.9m. This is slightly below what we would expect the centre to be trading at based on company average levels (£5.5m). The **Co-op** store, located on Andover Road, attracts the majority of the centre's trade (£4.2m), with 91% of it drawn from Zone 11 (its location zone).
 - **Malmesbury Town Centre** is performing above our estimate of company average turnover (£2.3m), with a turnover of £3.3m. The centre has a small convenience offer, with **Co-op** on High Street comprising the main provision. The centre also has a tightly confined catchment area with the centre's entire turnover coming from its location Zone (Zone 26). However, as a result of the lack of convenience offer in the centre a large proportion of Zone 26 residents are going to Tesco Extra in Cirencester (13.4%), Morrison's in Chippenham (10.3%), Waitrose in Cirencester (10.3%) and Sainsbury's in Chippenham (6.2%) for their main food shopping.
 - **Marlborough Town Centre** has a convenience turnover of £22.2m which is below what we would expect the centre to be trading at based on company average levels (£30m). The primary reason for this under performance appears to be the apparent under-trading of the key anchor store in the centre; Waitrose. This store, located on High Street, has a turnover of £20.6m which falls short of the £26.6m turnover we would expect based on average levels. As highlighted above, we

would expect the store in the town centre to benefit from lunch time/visitor trade which may not have been picked up from the household survey. Taking into account these factors and based on our site visit, which suggested that the store was trading well, we would expect the Waitrose to be trading at a higher level, more in line with company average levels.

- **Melksham Town Centre** has a turnover of £28.6m which is below our estimates based on company average sales (£31.5m). Similar to Marlborough town centre, the household survey indicates that the Waitrose store with a turnover of £1.1m is significantly under-trading compared with company average levels (£11.0m). In contrast, the Sainsbury's store, located off Bath Road in the north of the town, is over trading by £6.2m. The Waitrose store has only recently opened and will not have reached a mature pattern of trading so this is most likely to be the reason for it trading significantly below company average levels.
- **Tidworth Town Centre** has a turnover of £19.5m which again is below what we estimates based upon company average sales estimated at £32.7m. Tesco on Station Road is the key convenience anchor in the centre and we estimate that the store is trading below company average levels with a turnover of £18.5m, compared with what we expect it should be doing at £28.6m. However, it should be noted that our observations of the store from our site visit suggest that it was relatively busy and trading well. The household survey does reveal that a proportion of main food shopping trips are going from Tidworth's location zone (Zone 11) to foodstores within Andover. This may provide reasoning behind the centre's under-performance.
- **Warminster Town Centre** has a turnover of £37.2m which is well above our estimate of company average sales (£30.5m). This strong level of performance is wholly attributed to the Morrison's, to the rear of High Street (south side), which the survey results suggest is over trading by approximately £6.9m. Warminster, not surprisingly, attracts the majority of its convenience turnover from the centre's location zone (8); with £32.5m (74.1%) derived from this zone. The centre also attracts £3.3m from Zone 16 immediately to the north of the centre.
- **Westbury Town Centre** has a turnover of £8.9m in comparison with company average sales turnover (£16.7m). It is therefore apparent that the key anchor store

in the centre Morrison's, which has re-occupied the former Cooper County Store, is under-trading. The store has only recently changed to a Morrison's (June 2009), which could be a reason for the store's poor trading performance. This may be as a result of the stronger convenience offer in Trowbridge to the north and Warminster to the south, with both centres attracting spend from Westbury's location zone (16).

- **Wootton Bassett Town Centre** has a turnover of £11.9m which is below company average sales turnover estimated at £17.3m. The convenience offer in Wootton Bassett consists of a Sainsbury's (1,079 sq m net), Iceland (605 sq m net) and a Somerfield (428 sq m net). However, there is no single dominant anchor store in the centre which results in a high number of main food shopping trips leaving the centre's location zone (Zone 23). The Sainsbury's store in the centre does capture some main food shopping trips (10.5%); however, the majority are going to Calne, Swindon and out of centre provision in Chippenham. This suggests a deficiency in Wootton Bassett's convenience offer.

ii) Out-of-Centre Convenience Stores

- 6.24 The household telephone survey has identified a significant number of out-of-centre foodstores in the Wiltshire Council area which have a collective turnover of £278.7m. This is broadly in line with how we would expect these stores to be trading based on company average levels £289.0m (see Table 6.1).
- 6.25 The survey results identify that the out of centre provision surrounding Salisbury and Chippenham is the most dominant in Wiltshire. In Salisbury, the Tesco Extra on Bourne Way and the Waitrose on Churchill Way West are the two dominant stores surrounding the city centre. Both these stores are performing well with Tesco having a turnover of £62.9m compared with a company average level of £57.5m. It is also apparent that the Waitrose store has a turnover of £35.8m, which again is above the company average level we would expect for the store (£31.8m).
- 6.26 In Chippenham, the results of the survey suggest that the out of centre Sainsbury's on Cepen Park South is performing well above company average levels with a turnover of £62.9m from the household survey compared with a company average turnover level of £39.3m. In contrast, the out of centre Morrisons on Cepen Park North is

trading slightly below company average levels with a turnover of £38.9m from the household survey compared with a company average turnover level of £45.0m.

- 6.27 With regards to Trowbridge, the out of centre provision appears to be under performing based on the results from the household survey. For instance, Tesco Extra on County Way has a turnover from the household survey of £28.0m when we would expect the store to be trading at almost double that (£64.4m). It is possible that the layout and location of the store is one of the contributing factors to its under-performance. The store also does have strong competition in the form of Asda at the Shires in the town centre and the recently opened Sainsbury's to the north of the centre. However, the latter had not opened when the survey was undertaken. It is therefore possible that Tesco's market share could be reduced even further once the Sainsbury's store reaches a mature level of trading. The other out of centre provision including the Lidl on Canal Road and Aldi Bradley Road appear to be performing well.
- 6.28 There are a number of other out of centre stores supporting the convenience provision in other centres and these are set out in Table 7, Appendix 2. Stores of significance include Sainsbury's on Rowden Lane to the south of Bradford-on-Avon which is performing slightly above company average levels, whilst the recently opened Lidl in Amesbury is also performing slightly above company average levels.

Baseline Convenience Goods Capacity Forecasts

- 6.29 We have examined the capacity for further convenience goods floorspace arising in each of the major centres/market towns from 2009 up to 2026 (incorporating the interim years of 2010, 2015, 2025 and 2026 in accordance with PPS4. Capacity forecasts become increasingly open to margins of error over time and should be updated over the LDF period, therefore the capacity figures towards the end of the LDF period should be treated with a degree of caution. It is also important to note that the analysis is largely predicated on the performance of large foodstores owned by multiple retailers, and in considering need and impact at the local level the role and performance of smaller independent retailers (including market traders) should be taken into account.
- 6.30 Capacity inevitably arises in centres which are trading very well; however, this does not necessarily imply that such capacity is best met within these particular centres. As

highlighted in our policy recommendations, careful consideration should be given to opportunities where the capacity arising can better meet strategic priorities in more appropriate and sustainable ways.

- 6.31 Drawing on the latest advice from Experian, we have applied to our projections an annual growth in sales efficiency of existing floorspace of 0.1% between 2010 and 2015 and 0.3% between 2015 and 2026.
- 6.32 Our capacity projections are outlined in Table 6.2 below and illustrate the convenience goods capacity in each of Wiltshire's centres, on a cumulative basis. These incorporate commitments (identified in Table 8, Appendix 2) and are based on current market shares and turnovers to existing provision. The performance of out of centre stores surrounding the centres has been taken into consideration when forecasting need for additional convenience goods floorspace, to take account of the total convenience provision serving each centre.

Table 6.2: Cumulative Convenience Goods Capacity Projections (2015 - 2026)

Urban Area of Centre	2015 (Sq m net)	2020 (Sq m net)	2025 (Sq m net)	2026 (Sq m net)
<i>SSCT</i>				
Salisbury	-293	554	1,487	1,675
Trowbridge	-4,914	-4,332	-3,731	-3,618
Chippenham	703	1,338	2,011	2,141
<i>Market Towns</i>				
Amesbury	-1,643	-1,496	-1,336	-1,304
Bradford on Avon	213	329	456	481
Calne	756	928	1,115	1,145
Corsham	-94	-62	-29	-23
Cricklade	281	294	308	312
Devizes	-527	-302	-60	-9
Ludgershall	-12	30	76	86
Malmesbury	209	243	277	284
Marlborough	-2,095	-2,016	-1,914	-1,897
Melksham	-3,941	-3,697	-3,447	-3,396
Tidworth	-1,172	-1,027	-869	-838
Warminster	-266	-24	235	285
Westbury	-1,295	-1,188	-1,076	-1,054
Wootton Bassett	-487	-428	-363	-353

Source: GVA, Convenience Capacity Modelling Tables 9a-9n, Appendix 2

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- 6.33 Based on the current performance of centres/stores in each individual urban area, our assessment highlights some capacity for additional convenience goods floorspace in Salisbury and Chippenham up to 2020. This is primarily a result of the strong trading performance of out of centre provision in each centre. In Salisbury, we have factored in to the assessment the recent approval of a Lidl on Hatches Lane (S/2008/0550) and Aldi within Bourne Retail Park (S/2008/1389), and any identified capacity is over and above this committed floorspace.
- 6.34 Conversely, we identify no capacity to accommodate any further convenience floorspace in Trowbridge, which is partly as a result of the under performance of the out of centre Tesco on County Way, which the survey results suggest is significantly under-trading. In relation to Trowbridge, we have also factored in the Sainsbury's store in the north of the town which opened in June 2010 which reduces the residual capacity for further convenience floorspace.
- 6.35 In relation to the smaller market towns, there is capacity arising in several of these including Calne, Cricklade, Bradford on Avon and Malmesbury, whilst a small proportion is also arising in Ludgershall and Warminster. This is a direct result of the current trading performance of these centres as discussed above.
- 6.36 Evidently, a number centres are currently performing at a higher than expected level including Amesbury and Warminster as set out in Table 6.1. However, there are commitments coming forward for further convenience floorspace in these centres. For example, we have factored in the new Tesco on London Road in Amesbury to the north east of the town centre within the capacity projections. This was granted at appeal in September 2009 and comprises 1,950 sq m net of additional convenience floorspace and is due to open in November 2010. Factoring this commitment into the assessment for Amesbury results in there being negative surplus spend to support further convenience floorspace in the centre. The same situation occurs in Warminster after factoring the forthcoming Waitrose store, which received planning permission in October 2009, into the assessment. This store will be located on the site of the former Dents glove factory adjacent to Castlemore Retail Park. All of the convenience commitments factored into the assessment are set out in Table 8, Appendix 2.
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- 6.37 Overall, the capacity projections outlined above in Table 6.2 are based on forecast population and spending growth, and assumptions about the growth of e-tailing, and it is equally possible that the projections will prove optimistic. As previously mentioned, another important factor is that the capacity projections are based largely on the identified performance of main foodstores, and do not take into account the need to sustain and enhance the role of local shopping, independent retailers and markets, which are often equally as important to local communities and should therefore not be disregarded by the LPA.
- 6.38 Furthermore, our capacity assessment is based on current market shares to centres and it doesn't take into account any qualitative deficiencies in the centre or the scope to claw-back spend that is leaking to out of centre stores or destinations further a field. We discuss in para 6.62 onwards the scope to accommodate further convenience floorspace in each of the centres, taking into account the above considerations.

Comparison Goods Capacity Projections

- 6.39 This section presents our assessment of the current performance of the comparison retail provision across Wiltshire. We have assessed each of the main comparison goods shopping destinations by reviewing shopping patterns and performance of existing floorspace. Using the market shares derived from the survey and baseline expenditure estimates, we have calculated the comparison goods turnover of the strategic centres and market towns and out of centre locations. The tables accompanying the work are set out in Appendix 3.

(i) Performance of Wiltshire's Centres

- 6.40 The current turnover for Wiltshire's centres identified by the household survey is set out in Table 6.3 below. This also highlights the total comparison goods floorspace in each centre and their respective performance in terms of sales density. It should be noted that the turnover figures only represent the town centre turnover and not the additional turnover generated by the out of centre provision surrounding the centres. These capacity figures take into account the expenditure generated from outside the catchment area for Salisbury, Trowbridge, Chippenham and Devizes, utilising the results of the in centre survey results for each centre.

Table 6.3: Comparison Goods Turnover in Wiltshire's Centres (2008 Prices)

Centre/Destination	Turnover (£000s) 2010	Comparison fl sp (sq m net)	Sales density (£ per sq m net)
Major Centres			
Salisbury (With Inflow)	284,573	41,477	6,861
Trowbridge (With Inflow)	143,406	19,279	7,438
Chippenham (With Inflow)	115,466	15,079	7,657
Market Towns			
Amesbury	10,788	1,648	6,546
Bradford on Avon	3,814	1,570	2,429
Calne	5,112	1,675	3,052
Corsham	6,043	1,774	3,407
Cricklade	650	385	1,688
Devizes (With Inflow)	41,602	6,717	6,194
Ludgershall	0	301	0
Malmesbury	5,706	1,923	2,967
Marlborough	18,802	6,034	3,116
Melksham	22,815	4,975	4,586
Tidworth	791	711	1,113
Warminster	31,777	7,171	4,431
Westbury	6,377	1,808	3,527
Wootton Bassett	3,988	2,856	1,396
Total	701,711	115,383	66,409

Note: Inflow taken from results of In Centre Survey

Source: GVA Comparison Capacity Modelling (Appendix 3, Table 8) – figures do not include out of centre provision

- 6.41 The table above illustrates the position of Salisbury as the dominant comparison shopping destination in Wiltshire, which is reflected in the substantially lower turnover of Trowbridge and Chippenham. However, it is clear that Trowbridge and Chippenham do suffer from their close proximity to the higher order centre of Bath, whilst the dominance of Swindon on the core zones surrounding Chippenham is also apparent (See Plan 9).
- 6.42 Examining the performance of the centres in more detail highlights that within the whole survey area, **Salisbury City Centre** draws 8% of total available comparison goods expenditure. On the basis of current market shares, we estimate that Salisbury

City Centre draws £270.3m of comparison goods expenditure from within the survey area. In order to understand the full extent of the Salisbury catchment area and accurately calculate the turnover of the city centre, we drew on the in centre survey undertaken in the City Centre. This enabled us to robustly estimate the proportion of shoppers in the city centre travelling from beyond the survey area boundary. The origin of all shoppers travelling to Salisbury City Centre from across the country is illustrated on Plan 4. The assessment enabled us to calculate a 5% inflow of comparison goods expenditure from beyond the survey area, although it should be noted that seasonal tourist spend may boost inflow even further. We therefore estimate that the total comparison turnover of Salisbury City Centre is just under £285m which equates to a sales density of £6,861 per sq m net.

- 6.43 **Trowbridge town centre** has a turnover of £136.2m from within the survey area. Again, to understand the full extent of the town's catchment, we have drawn on the in centre survey results which indicates that the centre also attracts 5% of trade from outside the catchment area. By applying this additional inflow of trade, the centre's turnover increases to £143.4m. This equates to a sales density of £7,438 sq m net, which indicates that the centre's comparison offer is performing strongly.
- 6.44 It is evident that Trowbridge attracts a large proportion of its trade (72% or £104m) from the core zones surrounding the centre (Zones 16, 17, 19 and 20 – see Plan 5). However, it should be pointed out that in these zones, Bath attracts £49.4m of comparison trade which indicates the inevitable attraction of a centre which is 249 places above Trowbridge in the Javelin Retail Rankings (see Table 4.2, Section 4).
- 6.45 With regard to **Chippenham town centre**, the household survey demonstrates that the centre has a turnover below Salisbury and Trowbridge of £109.7m, which increases to £115.5m if we factor in inflow. This coincidentally is the same proportion (5%) as factored in for Salisbury and Trowbridge. This equates to a sales density of £7,657 per sq m net, which again suggests a strong trading position for Chippenham. On closer inspection, it is apparent that 80% (£92.3m) of Chippenham's turnover is derived from Zones 21 to 23, which highlights the relatively localised catchment of the centre (Plan 6). Chippenham is also losing a significant proportion of trade in these three zones to Bath (£41.5m) and Swindon (£56.7m), which reflecting the stronger comparison offer and high levels of accessibility of these two centres from Chippenham's core zones.

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- 6.46 Below these three strategic/major centres, it is apparent that the other smaller market towns have a mixed comparison shopping role and performance. It is evident from the results that a second tier of centre develops with Devizes having a turnover of £41.6m, Warminster (£31.8m), Melksham (£22.8m) and Marlborough (£18.8m) all performing well for their size and role in the local retail hierarchy. In particular, **Warminster** and **Devizes** are performing very strongly in their respective location zones, with both centres being the principle choice of destination for comparison shopping. For instance, Warminster retains 37% (£26.2m) of all comparison turnover from Zone 8 and Devizes captures 29% (£31.9m) of all trade from within Zone 15.
- 6.47 In relation to **Melksham**, the household survey indicates that the centre has a turnover of £22.8m, which equates to a sales density of £4,586 per sq m net. We have also modelled the out of centre Leekes Department store to the north of the town centre off Beancare Road (A350) which the survey results suggest is only trading at £2.7m. Given the sales floorspace of this store (11,365 sq m), we would expect this department store to be trading at a significantly higher level. It is therefore possible that part of the turnover attributed to Melksham town centre could also be connected to the turnover of Leekes department store.
- 6.48 Below this level, most of the remaining market towns have a more modest comparison retail offer, mainly focused on 'everyday' comparison goods which complements their more dominant convenience and service offer. Although it should be pointed out that Amesbury does have a relatively strong comparison turnover when compared with the proportion of comparison floorspace in the centre. The results of the household survey indicate that the centre has a relatively high market share for DIY/Decorating goods which is likely to be attributed to the location of the Focus DIY unit to the north west of the centre on London Road.
- 6.49 Several other centres including Bradford on Avon, Corsham and Calne, do have a strong specialist independent offer (antique/furniture shops), which specifically cater for the high volume of tourists/visitors to these centres. It should be noted that no market shares for comparison goods were recorded for Ludgershall, which highlights the relatively weak comparison offer in the centre, which is not surprising given its role as a convenience/service centre serving the needs of local residents.
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(ii) Out-of-Centre Comparison Goods Provision

6.50 Table 6.4 demonstrates the performance of comparison goods comprising out-of-centre retail warehousing in retail parks and stand-alone units. Given the wide distribution and scattered provision of retail warehouse offer, the results of the household telephone survey could not define between every unit, and has therefore been considered in groupings for the purposes of the retail capacity modelling (as illustrated below). We have only modelled the out of centre retail floorspace where clear market shares are identified.

Table 6.4: Comparison Goods Turnover in Wiltshire's Centres (2008 Prices)

Centre/Destination	Turnover (£000s) 2010	Comparison fl sp (sq m net)	Sales density (£ per sq m net)
<i>Out of Centre</i>			
Salisbury: Out of Centre	58,387	30,748	1,899
Trowbridge: Out of Centre	47,068	17,642	2,668
Chippenham: Out of Centre	60,853	19,671	3,094
Warminster: Out of Centre	5,120	3,757	1,363
Melksham: Out of Centre	2,652	11,858	224
Total	174,080	83,676	9,247

6.51 The results of the telephone survey suggest that collectively the out of centre units in Salisbury have a sales density of approximately £1,899 sq m net. Based upon a company average sales density for the retail warehouse units combined £2,804 per sq m net (Table 7, Appendix 3) our assessment indicates that this area of retail warehousing is performing slightly below expected levels.

6.52 In contrast, the retail warehousing in Trowbridge and Chippenham is performing better than expected when compared against company average levels. The results indicate that retail warehousing in Trowbridge has a sales density of £2,668 per sq m net when in fact we estimate that it should be performing at nearer £1,804 per sq m net. The results also show that retail warehousing in Chippenham is trading at £3,094

per sq m net, when we would expect it to be trading at closer to £1,761 per sq m (Table 7, Appendix 3).

- 6.53 Table 6.4 also reveals that retail warehousing in Warminster is performing below expectations (£1,363 per sq m net), when compared against company average levels (£3,789 per sq m net).
- 6.54 Melksham's sales density for out of centre provision is significantly lower than expected. As identified above, it is therefore possible that part of the turnover attributed to Melksham town centre could also be connected to the turnover of Leekes department store which would increase the turnover of the out of centre provision.

Baseline Comparison Goods Capacity Forecasts

- 6.55 We have examined the capacity for further comparison goods floorspace in each of Wiltshire's centres (incorporating the interim years of 2015, 2020, 2025 and 2026). It is important to note that capacity forecasts become increasingly open to margins of error over time and should be updated over the LDF period. These forecasts should also be viewed in the context of the current slowdown in the economy and lower levels of growth in expenditure up to 2015 to reflect this.
- 6.56 As a result of the extensive geographical coverage of Wiltshire's administrative area we have not specifically examined global capacity to support further comparison floorspace. This is mainly due to the different nature of the centres and the catchments they serve. In theory, for example, it would be unrealistic to assume that capacity arising in Chippenham's urban area could be re-directed to Salisbury if no sites were available in Chippenham to support further retail floorspace. We have therefore considered capacity on a place basis, based on both in centre/out of centre provision in each of the centre' urban areas.
- 6.57 In assessing capacity, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and have assumed an annual growth rate in existing sales per sq m net of 1.5% up to 2015 and 2.0% there after. Drawing on our experience elsewhere in similar sized and performing centres we have also assumed that new floorspace should achieve sales of least £5,000 per sq m net in 2010 in the strategic centres of Salisbury, Trowbridge and Chippenham, also growing

by 1.5% per annum up to 2015 and then up 2.0% after 2015 and a sales density of £4,000 per sq m net in the smaller market towns. The sales density figures used slightly higher than the centre's current performance due to the scope for new floorspace to trade more efficiently.

- 6.58 This assessment has considered the effect of Wiltshire's centres maintaining their existing market share and used growth in available expenditure to support the development of new floorspace. Maintaining existing market share throughout the LDF period for all of the centres in Wiltshire is a priority, but particularly for the major centres of Salisbury, Trowbridge and Chippenham, which will be faced with strong competition from more dominant centres in the wider sub region e.g. Bath, Swindon and Southampton.
- 6.59 In line with conventional practice, we have modelled the turnover attributable to out-of-centre facilities and grouped this turnover alongside the performance of the adjoining town centre to generate overall capacity arising in each centre's 'urban area'. The capacity arising as a result of any current 'overtrading' of out of centre floorspace should not automatically suggest any quantitative need for further expansion of out-of-centre provision. Clearly, any capacity generated by out of centre provision should be directed to town centre locations in the first instance in line with PPS4.
- 6.60 When forecasting capacity for new comparison goods floorspace in the county our model has taken into consideration known commitments for new comparison goods floorspace arising in each 'urban area'. These are set out in Table 9, Appendix 3. These generally comprise comparison floorspace arising in supermarkets; however, the significant one for Salisbury, which was taken into account in the 2006 Retail Study, is the 10,034 sq m net bulky goods retail warehouse scheme on London Road at the roundabout junction with Pearce Way. Based on a sales density of circa £2,000 per sq m net, we estimate the commitment will generate a turnover of circa £20.1m by 2010.
- 6.61 It is evident from Table 6.5 (below) that there is further capacity to support additional comparison floorspace in Wiltshire's centres up to 2026. This is based on a constant market share approach and does not take into account the potential for redistribution from elsewhere in Wiltshire i.e. out of centre provision, or the potential for

the centres to increase market share and overall available expenditure to support additional floorspace through claw-back of expenditure.

- 6.62 For these reasons, the figures in Table 6.5, like the convenience capacity projections, **should not be viewed as the maximum amount of comparison floorspace that can be supported in each specific centre.** The figures are provided as an indication of the baseline capacity and are not intended to represent an absolute ceiling on floorspace. Any proposal will need to be assessed against the key tests set out in PPS4.

Table 6.5: Cumulative Comparison Goods Capacity Projections (2010) With Commitments

Urban Area of Centre	2015 (Sq m net)	2020 (Sq m net)	2025 (Sq m net)	2026 (Sq m net)
<i>SSCT</i>				
Salisbury	2,475	12,168	23,196	25,587
Trowbridge	3,746	11,169	19,517	21,242
Chippenham	3,181	7,975	13,337	14,479
<i>Market Towns</i>				
Amesbury	-1,873	-1,444	-957	-853
Bradford on Avon	79	205	347	379
Calne	123	302	505	547
Corsham	115	308	521	567
Cricklade	12	31	53	58
Devizes	839	2,125	3,567	3,889
Ludgershall	0	0	0	0
Malmesbury	107	280	471	512
Marlborough	373	938	1,599	1,735
Melksham	607	1,479	2,446	2,657
Tidworth	24	55	92	100
Warminster	537	1,891	3,418	3,744
Westbury	187	450	745	809
Wootton Bassett	88	220	368	400

Source: Comparison Modelling Appendix 3, Tables 10a – 10o

- 6.63 As Table 6.5 highlights, the majority of capacity is arising in the major centres of Salisbury, Trowbridge and Chippenham. We estimate that by 2020, based on current

market shares, there would be capacity to support an additional 12,168 sq m net of comparison goods floorspace in Salisbury, 11,169 sq m net in Trowbridge and in the same period slightly less in Chippenham (7,975 sq m net).

- 6.64 The capacity arising in the smaller centres is more minimal; however, capacity is arising in the better performing market towns such as Devizes and Warminster with 2,125 and 1,891 sq m net, respectively identified by 2020.

Scope for expenditure claw-back

- 6.65 The figures identified above in tables 6.5 are based on current market shares, and do not consider the potential for a potential uplift in market share through claw-back from competing centres/out of centre destinations. However there may be scope for Wiltshire's Strategic Centres to increase their market share to support further comparison floorspace beyond that identified in our baseline capacity assessment and we broadly discuss the scope for this to take place below.
- 6.66 On closer inspection of the performance of Salisbury City centre, it is apparent that the centre has a market share of 65% (£125.3m) within its location zone (Zone 4). From within this zone, £21.8m is leaking to Southampton and approximately £8.3m is leaking to the centres such as Bournemouth, Bath, Poole and Central London. In theory, if all of this spend leaving Salisbury's urban area (excluding Retail Warehousing) could be clawed back to Salisbury (£37m) we estimate, based on a sales density of £5,000 per sq m net, that an additional 7,400 sq m net of comparison floorspace could be supported in Salisbury.
- 6.67 It is also evident from the household survey results that Chippenham is losing a significant proportion of comparison trade within its location zone (Zone 22) to Bath (£17.8m) Swindon (£15.3m) and Bristol (£5.7m), which equates to £38.8m in total. In the unlikely scenario that all this expenditure could be clawed back to Chippenham we estimate that an additional 7,760 sq m net of floorspace could currently be supported in the centre.
- 6.68 In Trowbridge's location zone (Zone 17), it is apparent that £18.7m of comparison expenditure is going to Bath and approximately £6.0m, is collectively being diverted to Bristol, Swindon, central London and Southampton. In total, this leakage of trade to

the higher order centres (c.£24.7m), if successfully clawed back, could generate approximately 4,940 sq m net of additional comparison floorspace in the centre.

- 6.69 Evidently, this assessment of claw-back to each of the three strategic centres is a theoretical scenario and would require a significant proportion of spend that is currently leaving their core catchment area to be diverted back to the centres. Clearly this is not entirely realistic as the scope for claw-back will depend on the scale, location and quality of new floorspace that can be accommodated in each centre going forward. Consideration of the sequential approach to site selection and impact will also need to be addressed in providing such floorspace.
- 6.70 It should be pointed out that these scenarios do not take into account that people are likely to be shopping at these different locations for other reasons beyond the possible retail limitations of the centres. Undoubtedly, leakage of comparison spend will occur in any location mainly due to the location of comparison provision to people's work and the ease of using this over visiting their nearby centre, as well as other attractors that the competing centres may have such as quality department store provision. Thus, although our study assesses the scope to claw-back all this trade to Salisbury, Chippenham and Trowbridge it should be, to a degree, treated with caution for the reasons set out above.
- 6.71 Furthermore, a detailed examination will be required to understand what the impact could be on the centres/destinations which this trade will be clawed back from, with detailed consideration given to the spatial relationship of these three strategic centres to the other towns in the immediate surrounding area.
- 6.72 In relation to the possible claw-back of convenience spend to individual centres, this can prove very complex due to the more localised shopping trips involved with convenience shopping and the detailed consideration of the spatial relationship of centres in relation to where they should be drawing their trade from. If central sites become available in centres which are currently surrounded by a strong presence of out of centre foodstores i.e. Trowbridge/Salisbury and there is clear evidence that a new foodstore in a central location could support the regeneration of a long under-used or vacant site then this could provide an opportunity to claw-back convenience spend from out of centre locations. This will need to be considered in more detail as when planning applications come forward, with each application considered on its

own individual merits taking into account the key tests of PPS4. We discuss this issue in more detail in Section 8.

- We have undertaken economic capacity projections for convenience and comparison retailing in each centre in Wiltshire. Our analysis indicates that the total population of the survey area is forecast to grow from 1,197m in 2010 to 1,369m by 2026 – a strong increase of 14.4%. Convenience goods expenditure is expected to increase from £2,213m in 2010 to £2,625m by 2026. In the comparison sector, higher growth rates illustrate that spending will increase from £3,530m in 2010 to £6,597m by 2026 – an overall growth of over 87.4%.
- In terms of capacity projections, our analysis has identified some convenience goods capacity arising in Wiltshire's centres including scope for new provision in some centres including Chippenham and Calne. The potential for further convenience provision beyond the baseline capacity assessment is examined in more detail in Section 8.
- In the comparison sector, our assessment identifies a strong level of trading performance for the strategic centres of Salisbury, Trowbridge and Chippenham, whilst some smaller market towns including Devizes and Warminster have equally strong comparison turnovers for their size. The majority of comparison capacity is arising in the three strategic centres, with 2,475 sq m identified in Salisbury, 3,746 sq m in Trowbridge and 3,181 sq m identified in Chippenham by 2015.

7. Other Town Centre Uses – Commercial Leisure

- 7.1 As part of this study we have also assessed commercial leisure uses in Wiltshire. Nationally, commercial leisure covers a wide range of uses, such as cinemas (both multiplexes, and more traditional town centre cinemas), bowling alleys, night clubs, family entertainment centres, health and fitness studios; and various food and drink outlets, such as pubs and restaurants.
- 7.2 In this section, we review trends affecting the commercial leisure market, as well as the distribution of existing commercial leisure facilities in Wiltshire. We also look at patterns of usage using the results of the 2010 telephone interview survey and in-centre survey which included specific questions regarding leisure usage to ascertain where people are going to use particular leisure facilities including cinema, theatre, eating out, visiting nightclubs, health and fitness and bowling.
- 7.3 There is no robust methodology for forecasting capacity for specific forms of leisure development. In any event, new leisure formats are continually evolving, fuelled by external factors. However, to provide an indication of capacity for additional commercial leisure facilities, we have examined current and forecast growth in leisure expenditure.

Cinema Provision and Need Assessment

- 7.4 According to Dodona Research (2009) cinema audiences grew significantly during the 1990s, but this growth reached a plateau by the start of the current decade. Table 7.1 provides a summary of key industry indicators and charts changes in revenues and screen numbers between 2003 and 2008.

Table 7.1: UK Cinema Market 2003-2008

	2003	2004	2005	2006	2007	2008
Screens	3,318	3,342	3,357	3,440	3,514	3,610
Admissions (£m)	167.5	171.5	164.7	156.6	162.4	164.2
Average Ticket Price (£)	4.43	4.49	4.68	4.87	5.05	5.18
Gross Box Office (£m)	742.000	770.000	771.350	762.300	820.000	850.200
Spend per head (£)	1.70	1.75	1.80	1.85	1.90	1.95
Screen Advertising Receipts (£m)	65.000	70.000	70.000	85.000	90.000	86.500
Admission per person	2.81	2.86	2.73	2.58	2.63	2.61
Admission per screen	50,482	51,317	49,059	45,523	46,223	45,491

Source: Dodona Research 2009

- 7.5 In 2008, there were 3,610 cinema screens across the UK, of which three-quarters were multiplexes.¹⁷ The remainder are traditional cinemas that have mainly been converted to multi-screen use, large format screens such as IMAX, and screens in mixed-use venues such as arts centres. The dominant operators are Odeon and Cineworld although since the consolidation of the industry in 2005, Vue has undertaken an aggressive building programme to try and increase their market share.
- 7.6 The cinema industry is not immune from the recession and there were some closures during 2008, the majority being art centre venues rather than high street chains. The current economic downturn has hit advertising revenues but in general the industry is considered to be in good health. Indeed, in October 2009, The Times¹⁸ reported that cinemas are experiencing a boom with UK cinema admissions for the first six months of 2009 at their highest levels since 2002. Although ticket prices have been rising, a night at the cinema is considered to represent a relatively cheap night out, especially for families.

¹⁷ Purpose-built cinema complexes with more than five screens.

¹⁸ The Times 'Twist in the plot as British cinema defies the recession', October 24th 2009

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- 7.7 Over the last couple of years, cinema operators have made considerable efforts to improve customer yields by introducing changes such as premium seating areas and enhancing the range of refreshments such as alcohol and higher quality food. Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas as well as regular seats. National Amusements rolled out its 'Cinema de Lux' concept at three shopping malls in 2008, which is a high service concept with allocated leather seating, contemporary dining and concierge facilities.
- 7.8 Another development has been the introduction of 3D films, which are attracting premium ticket prices from operators. In the future, Dodona predict that operators of traditional cinemas, particularly those with only one or two screens, will find their competitive position eroded, especially if family audiences start travelling longer distances to larger cinemas to obtain the latest 3D experience.
- 7.9 Dodona Research suggests that very large cinemas have fallen out of favour. They cite Odeon's new 14 screen cinema in Liverpool, which opened in October 2008, the first cinema of this size to open since May 2004. It would appear that new cinemas are being built to serve smaller catchment areas and despite often having the same number of screens, the number of seats in each auditorium has been reduced.
- 7.10 Investment in new cinemas is continuing but this is no longer producing such high levels of growth so the focus has switched to replacing or relocating existing cinemas. There is also some investment in under-served areas, however Dodona consider this to be merely offsetting a decline in existing markets. Over the short to medium term, future cinema projects are likely to be impacted by the level of availability of finance for property developers, although it would appear that investment in better seating, better bars and cafés and new buildings is continuing. More recently in the midst of the recession, HMV announced that it was testing a three screen art-house format above its Wimbledon music store. The movies part of an effort by HMV to diversify away from selling low margin CDs and DVDs.
- 7.11 Results from the 2010 telephone survey indicate that in terms of leisure activities, going to the cinema was the most popular activity. 53.6% of respondents stated that they go to the cinema. Table 7.2 illustrates the market shares of the main cinemas in the study area. The largest cinema within the Wiltshire study area is the Odeon Salisbury,
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which is located in the city centre. The cinema has 5 screens and the entrance foyer opens on to New Canal from a historic building dating back to the fifteenth century. The cinema first opened in Salisbury in the 1930s. It is evident from the 2010 telephone survey that as well as being the largest cinema within the Wiltshire Local Authority area, it is also the most popular cinema, attracting 9% of respondents. The Reel Cinema in Chippenham is the only other cinema in Wiltshire to have more than one screen, although it attracts a lower amount of visitors (2%). The other screens within the study area are single screen cinemas in Salisbury, Trowbridge and Devizes.

Table 7.2: Dominant Cinema Destinations

Cinema	Postcode	No of Screens	No of Seats
Wiltshire Local Authority			
Odeon, Salisbury	SP1 2AA	5	1059
Reel / Astoria Cinema Chippenham	SN15 1JR	2	430
The Palace Cinema, Devizes	SN10 1JQ	1	253
Arts Centre, Salisbury	SP1 3UT	1	150
Arc Cinema, Trowbridge	BA14 0ES	1	150
Outside Local Authority Area			
Cineworld, Shaw Ridge Leisure Park, Swindon	SN5 7DN	7	1866
Odeon, Bath	BA1 2BX	8	1589
Empire Tower Park, Poole	BH12 4NY	10	2080
Reel, Andover	SP10 2RW	4	617
Vue, Cribbs Causeway, Bristol	BS10 7SR	12	2622
Cineworld, Yeovil	BA20 1NP	10	1897
Vue, Festival Place, Basingstoke	RG21 7BB	10	2231
Odeon, Leisure World, Southampton	SO15 1RE	13	3128
Odeon, Bournemouth	BH1 2BZ	6	1767

Source: Dodona Research 2009

- 7.12 Results of the 2010 telephone survey indicate a high proportion of residents from within the survey area visit cinemas located outside of Wiltshire Local Authority area. The survey found that the most popular cinema was the Cineworld at Swindon's Shaw Ridge Leisure Park (26.7%) followed by the Odeon at Kingsmead, Bath (13.7%). It is

apparent that people across the survey area are using cinemas in Swindon, Bath, Bristol, Poole, Andover and Yeovil, and that there is leakage of cinema trade. For example: in zones 1 and 2 in the south of the survey area, 51% and 57% of people use the Empire Cinema in Poole; in zone 10 in the east of Wiltshire, 66% of people use the cinema in Andover; in the catchment area of Trowbridge, zones 16-19 have a significant leakage of cinema trade (between 38% and 67% of people) to the Odeon in Bath; and there is also a significant amount of leakage to Swindon of between 37% and 92% from zones 12-15 and 22-26 which contain the centres of Chippenham, Devizes, Marlborough and Wootton Bassett, which indicates that there is the potential to claw back lost cinema trade in these centres.

- 7.13 On this basis, it is clear there is a qualitative need for further cinema provision within Wiltshire, if suitable sites come forward for such development. This is also supported by the results of the household survey which highlights that the largest proportion of respondents (9.2%) from the household survey consider that a cinema facility is lacking within a reasonable distance of their home.
- 7.14 In planning for a new cinema facility the Council will need to follow the sequential approach to site selection, showing preference to town centre locations first, before considering edge-of-centre locations and finally out-of-centre locations. New cinema provision would also need to provide the latest in cinema experience technology, for example 3D screenings, to prevent consumers from travelling further for specific film screenings.
- 7.15 We discuss the proposals for a new leisure complex coming forward in Trowbridge which will include a new multi-screen cinema coming forward in Trowbridge (below).

Ten-Pin Bowling

- 7.16 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years, but after a period of growth in the 1980s, decline set in during the early 1990s. Since then, however, a spate of investment in new centres and refurbishments by recognised chain brands has revitalised the industry to a degree and ten pin bowling remains a strong family activity.
- 7.17 Mintel research (2006) acknowledged the emergence of high-end, centralised venues, but the question remains whether this can dispel the lingering sense amongst

many that bowling is either passé or too child, or youth-orientated, whilst offering only basic refreshments. It would appear that it is down to the market and investor confidence to decide, although the concept is already beginning to evolve to generate customer demand. For example, the Bloomsbury Bowl Lanes in Bloomsbury offers a 50s 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.

- 7.18 Bowling activities are undertaken by 22.9% of respondents of the 2010 telephone survey. There are two ten pin bowling centres in the study area. Outburst Bowling in Salisbury is located in an out-of-centre location to the east of Salisbury city centre. Outburst Bowling has 6 ten pin bowling lanes and is located within a poor quality building on the Milford Trading Estate. Christie Miller Sports Centre in Melksham also offers 6 ten pin bowling lanes, in an out-of-centre location to the south of Melksham. The telephone survey results show that Outburst Bowling is the most popular ten pin bowling centre in the Local Authority area, although the destination only manages to attract 4.9% from the survey area. Christie Miller Sports Centre attracts a similar scale, 4.6% from the survey area.
- 7.19 Using the 2010 telephone survey results it is apparent that the most popular bowling facilities are located outside of the Local Authority area. The most popular ten pin bowling centre for residents of the survey area is the Megabowl in Swindon, drawing 33.5% from the survey area. Bowlplex in Bristol is the next most popular destination attracting 12.6%, whilst Megabowl in Poole attracts 11% from the survey area. Closer analysis shows that each facility generally draws from a local catchment e.g. Swindon is the dominant bowling centre in Zones 13, 23, 24, 25 and 26, whereas the Bowlplex in Bristol has the highest market share in Zones 7, 18 and 21. In the east of the centre, Southampton draws a high market share from zones 3 and 4 which cover the Salisbury area. Also drawing a significant amount of trade from the eastern side of the survey area are bowling alleys at Basingstoke, Thatcham and Yeovil. The household survey also revealed that 7.4% of respondents consider that a bowling facility is lacking within a reasonable distance of their home.
- 7.20 There may be opportunities to provide additional facilities in Wiltshire's strategic centres of Salisbury, Trowbridge and Chippenham to broaden consumer choice within this sector, although any facility would need to follow the sequential approach

to site selection. Based on wider consumer trends we would expect, at least in the short term, for future bowling facilities to come forward in smaller niche and themed formats, such as the Bloomsbury Bowl in London. A good opportunity where this might be appropriate would be within the more dominant centres to improve the existing leisure offer and encourage more family-friendly leisure facilities.

- 7.21 Ultimately, the market supply will meet demand, provided that the correct conditions exist within which it is able to operate. In this case, it will be important for the Council to ensure that an appropriately flexible policy framework exists to enable future development of this nature to come forward.
- 7.22 As mentioned above, and discussed in more detail (later in this section), we understand the new leisure complex coming forward in Trowbridge is expected to include a new bowling complex.

Bingo

- 7.23 Bingo is one of the oldest forms of gambling in the UK and has traditionally had a downmarket image limiting its appeal as a night out for the majority of the population. The typical bingo player has been perceived as lower income, female and from the older demographic. However, over the last decade, the market saw a rise in the number of younger and more affluent players and deregulation allowed clubs to offer bigger prizes.
- 7.24 Nevertheless, research by Mintel (2007) highlights that the industry has experienced a fall in revenues and admissions as a result of legislative changes such as the ban on smoking in public places and the rise of the online gambling. The recession has also hit the market and although operators have attempted to diversify their offer to halt the decline in participation rates, it would appear that this has merely slowed the decline and operators continue to struggle in tough market conditions.
- 7.25 There are two bingo halls located within the Wiltshire Local Authority area. Gala Bingo in Salisbury is located within Salisbury city centre. Angel Bingo in Devizes is located in Devizes town centre. Other bingo halls situated close to the study area include Gala Bingo in Swindon, Gala Bingo in Bournemouth, and Mecca Bingo in Andover. The results of the household survey indicate that just 5.7% of respondents play Bingo. Of these respondents, the majority (39.1%) identified Gala Bingo in

Swindon as where they go most often, whilst 23.6% stated that 'it varies' or 'don't know'. Gala Bingo in Salisbury attracts only 4% of the respondents and Angel Bingo in Devizes attracts 1%. Gala Bingo in Bournemouth and Mecca Bingo in Andover attract around 4% of bingo players.

- 7.26 Consequently, there may be additional scope, subject to market demand, for bingo facilities located in easily accessible areas in Wiltshire particularly in the north of the LPA area where there is a significant leakage of expenditure to Swindon. The quality of provision needs to be carefully monitored to provide ease of access to consumers and providing a market destination that can rival competitor facilities in Swindon.

Health and Fitness Clubs

- 7.27 According to Mintel's report on Health and Fitness Clubs – UK (May 2003), between 1998 and 2002 the value of the private health and fitness club market increased by 62% at current prices; in real terms the growth was still substantial at 49%. Mintel recognise changes in sporting fashions, which have shifted away from competitive sports towards those focused on personal health and fitness development.
- 7.28 It is now apparent that the health and fitness sector was struggling long before the onset of the economic downturn, although it is clear that the recession has compounded some of the problems faced by the industry such as falling membership rates. The Esporta chain was one of the most high profile casualties and was placed into administration in 2008. However, the Esporta business failed to sell and it is understood that it has been taken out of administration by its main creditor, who is trading the business until a buyer can be found. The number of new openings in the sector was static in 2008 and proposed openings have fallen sharply in 2009, with commentators predicting that many projects are likely to be shelved.
- 7.29 Nevertheless, there is evidence that value and budget operators are entering the health and fitness market and are actively looking to expand their businesses throughout the UK. This new breed of clubs aims to appeal to a wider market with subscriptions typically at £10 to £20 month. It is apparent that there will be sacrifices to the quality of the offer but that this offer is well suited to financially uncertain times.
- 7.30 We have reviewed the provision of both public and privately operated health and fitness clubs within Wiltshire. Due to the number of health and fitness facilities spread

across the Wiltshire area, the 2010 telephone survey results for each individual fitness centre are low, with over 90 facilities mentioned in the survey results. The results of the 2010 telephone survey indicate that within Salisbury city centre, the most popular facility was Five Rivers Leisure Centre, which attracted 4.2% of respondents. LA Fitness, Salisbury was identified by 1.1%, 'Salisbury' was identified by 1%, Parkwood Health and Fitness Club (0.7%), and Energie Fitness Club (0.1%). A number of health and fitness centres in other major Wiltshire centres that draw a percentage of trade include;

- The Olympiad Centre, Chippenham (2.6%)
- The Calne Leisure Centre, Calne (2.1%)
- Springfield Leisure Centre, Corsham (1.5%)
- Devizes Leisure Centre, Devizes (1.3%)
- Tidworth Leisure Centre, Tidworth (1.3%)
- Marlborough Leisure Centre, Marlborough (1.2%)
- Castle Place Leisure Centre, Trowbridge (1%)

7.31 There are also leisure facilities in Amesbury, Bradford-on-Avon, Downton, Durrington, Pewsey, Warminster, Westbury, Melksham, Cricklade, Wootton Bassett, Malmesbury and Tisbury. Closer analysis indicates that each facility generally draws from a local catchment, for example, Salisbury is the dominant catchment for Zones 4, 5 and 9.

7.32 Health and fitness clubs outside of Wiltshire also perform well, with the most popular being Bath Sports and Leisure Centre in Bath (6.6%), Andover Leisure Centre in Andover (4.6%) and Oasis Leisure Centre in Swindon (4.2%). These health and leisure centres also draw from a local catchment.

7.33 Overall, we consider there is a good range of health and service facilities across the District. In terms of planning for further facilities, we recommend that health and fitness clubs should be directed towards town centres first, as part of more comprehensive mixed-use retail and residential schemes. The potential for new facilities and private sector investment can be facilitated through flexible town centre policy options, particularly with a view to the new budget operators looking to expand. We do not consider that it is helpful to assess the quantitative need for new health and fitness clubs, as this will largely be determined by market demand and the availability of suitable and viable sites.

Leisure Expenditure Projections

- 7.34 This section analyses the overall growth in leisure expenditure to demonstrate the extent of growth in this sector. We have taken the base position and projected available expenditure per capita leading up to 2026 based on the population projections for the survey area, and assuming an ultra long term growth rate in available expenditure of 2.1% per annum for leisure goods from Experian Business Strategies Retail Planner Briefing Note 7.1 (August 2009).
- 7.35 The Experian E-marketer Report calculates annual consumer leisure expenditure¹⁹ per person on leisure and recreation goods and services in 2008, based upon the demographic profile of the catchment area. Applying the per capita goods expenditure to the total population of the survey area, shows that there is currently £2,252m of available leisure expenditure, which is expected to rise to £3,590m by 2026 (See Table 7.3 below and Table 3, Appendix 4). There is no published market data available which would allow an assessment to be made of the potential turnover of leisure facilities; therefore it is not possible to assess the scope for which this expenditure could be translated into actual floorspace.

Table 7.3: Total Leisure Expenditure

	2010 (£)	2015 (£)	2020 (£)	2025 (£)	2026 (£)
Survey Area	2,252,663	2,611,854	3,021,167	3,490,500	3,590,166

Source: Experian Business Solutions, E-marketer, 2009

The Evening Economy

- 7.36 The pub industry continues to suffer from the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. Other factors such as competition from the supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems

¹⁹ Leisure expenditure includes recreation and sporting services, cultural services, games of chance (gambling) and bars/restaurants.

faced by many operators. Many of the large national pub chains have faced difficulties and there have been cases of administration. However, on the plus side, this has meant that smaller multiples have been able to acquire premium sites at bargain prices and value led brands such as JD Wetherspoon have achieved significant sales growth and continue to expand.

- 7.37 It is generally considered that the recession has brought mixed fortunes for the restaurant sector. The main casualties appear to have been from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands have announced stable results and are seeking to trade through the uncertainties by offering heavy promotions and discounts. The fall in property prices has also provided an opportunity for stronger niche operators to expand their brands as they have been able to negotiate substantial discounts on rents and landlords have been offering attractive incentive packages to help fill vacant units.
- 7.38 For families in particular, going out for a meal has become too expensive, and many have switched to staying at home with a takeaway which has increased sales for businesses such as Domino's. There has also been a surge in 'all-you-can-eat' style restaurants which are aimed at offering value for money for lower income families. The Taybarn brand owned by Whitbread is currently trading very strongly and the brand is pursuing aggressive openings.
- 7.39 The 2010 telephone survey results indicate that the most popular destinations for evening eating and drinking are not within the Wiltshire Local Authority area. 15.8% of respondents visit Bath most often for evening eating and drinking, and 12.2% visit Swindon most often. Other centres outside of the survey area that are popular evening eating and drinking destinations including Andover (4.6%), Bournemouth (3.3%) and Cirencester (3.3%). Within the survey area, Salisbury city centre is the most visited evening eating and drinking destination (7.6%), followed by Chippenham (3.1%), Trowbridge (2.3%), Devizes (2.2%), Marlborough (2.2%), Warminster (1.3%) and Bradford-on-Avon (1%).
- 7.40 The survey results indicate that there is a significant loss of evening economy trade to outside the Wiltshire area, offering the Wiltshire centres an opportunity to enhance the existing evening economy offer to increase the popularity of these centres as an

evening destination and claw back trade from other centres. We would recommend future planning policy frameworks and allocations focus on enhancing the evening economy in each centre, whilst promoting new areas for more eating and family friendly destinations to ensure the maximum mix of uses and increased visitor numbers.

Restaurant/Café Expenditure

- 7.41 According to Experian Business Solutions (2006) the average person spends £1,106 per annum in restaurants/cafes. The average spend for all the zones in the survey area population is slightly below average at £1,064 per annum per person. Experian also estimate that people's average likely spend on leisure goods such as eating out increases by 2.1% each year. Our restaurant / café expenditure forecasts show that currently the total spend available for restaurants/cafés in the Wiltshire survey area is £1,340m, increasing to £1,798m in 2020, and to £2,137m by 2026 as identified in Table 5 and Appendix 4. Like the retail expenditure growth rates, these growth rates should be treated with caution towards the end of the LDF period due to the uncertainties over growth in the general economy.

Table 7.4: Restaurant /Café Expenditure Forecasts

	2010 (£)	2015 (£)	2020 (£)	2025 (£)	2026 (£)
Survey Area	1,340,815	1,554,667	1,798,310	2,077,731	2,137,052

Source: Experian Business Solutions, E-marketer, 2009

- 7.42 Our assessment highlights sufficient growth in the survey area to sustain a circa 34% growth in the restaurant/café sector by 2020. This is a strong level of growth and we recommend that this is directed towards town centres first in accordance with national planning policy.
- 7.43 Research indicates that mixed-use town centre schemes can comprise a significant quantum of A3, A4 and A5 floorspace to complement the wider retail, office and residential offer. Given best practice, the growing trend towards mixed-use schemes discussed and evident strong growth in expenditure in this sector, it is usual to assume that comparison goods retail schemes will comprise circa 15% of leisure floorspace (i.e. Use Class A3/4/5 eating and drinking). Whilst this is a relatively crude assumption,

it provides an indication of the level of café, bar and restaurant floorspace which could be provided.

Theatres and Cultural Venues

- 7.44 Theatres are primarily part of the evening / night-time economy within town centres and generally attract comparatively few people in the day-time. However, as part of the evening economy, theatres have the ability to act as a hub to wider cultural activities. These can also bring the well-behaved, comparatively, mature audience into the town centre as a night-time civilising influence.
- 7.45 Theatres and cultural activities were identified in the 2010 telephone survey as the second most popular activity, undertaken by 50.4% of respondents. The main theatre in Wiltshire is the Salisbury Playhouse, located adjacent to City Hall and the Maltings in the east of Salisbury city centre. The Playhouse was built in 1976 and refurbished in 1996 with the help of a £1.47 million National Lottery grant with another major extension in the last few years. The venue holds productions in both the main theatre (517 seats) and the smaller studio (149 seats). The Playhouse hosts a range of shows including traditional theatre, musicals, youth theatre and pantomime.
- 7.46 The 2010 telephone survey found that 11.1% of people who visit the theatre most often visit Salisbury Playhouse / Salisbury City Hall. The Salisbury Arts Centre provides a further cultural venue in the city, with up to 270 seats. The Arts Centre was redeveloped in 2005 and hosts a wide range of cultural events including performances, films, workshops, visual arts, exhibitions, dance and comedy. Salisbury is also the location of Studio Theatre, an amateur dramatics company comprising a 92 seat theatre that was recently built in 2006.
- 7.47 Additional theatre / cultural provision in Wiltshire that were identified in the telephone survey include; The Athenaeum Centre, Warminster, a Grade II Listed building featuring an auditorium of 226 seats; The Arc Theatre, Trowbridge, a small scale professional theatre with 150 seats; and Wharf Theatre, Devizes, a 96 seat theatre staging a range of productions. These theatres draw a smaller amount of visitors from the survey area, between 0.1 and 0.5 %, which tend to be local to the venue.
- 7.48 Outside of the Local Authority area, the most visited theatres / cultural facilities are Theatre Royal, Bath (20.4%), Wyvern Theatre, Arts Centre, Swindon (14.3%) and
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Mayflower, Southampton (7.1%). 10% of people who visit theatres / cultural facilities travel the further distance to visit London most often for theatres / cultural facilities. The range and quality of theatres in London's West End will continue to attract visitors from a very wide catchment.

- 7.49 As a result of the cultural and artistic facets of theatre productions, a person is more likely to travel to see a particular production, which some of the larger theatres are equipped to attract and successfully stage for long periods. Therefore, to ensure that the influence of London's West End does not grow to the detriment of businesses and vitality and viability of the cultural offer in Wiltshire, it may be necessary to improve both the quantum and range of cultural facilities for both local residents and visiting tourists.

Leisure Commitments

- 7.50 The key leisure commitment coming forward within Wiltshire is the Waterside development in Trowbridge to the south of the town centre. Outline planning permission was granted for the first phase of the Waterside development in Trowbridge in March 2008. The scheme is expected to include a variety of restaurants and bars, as well as an 8 screen multiplex cinema with approximately 1200 seats. The scheme was also to include a Bowlplex which will involve a 20 lane bowling and entertainment centre and the comprehensive development of this area was expected to be completed by the end of 2010. However, we understand the proposals are currently on hold as the Council's chosen developer Modus has gone into administration.

Summary

- Our assessment of the commercial leisure sector in Wiltshire indicates a reasonable range of commercial leisure facilities. Within and around Salisbury city centre there are two cinemas, bingo, bowling centre, over five health and fitness facilities and three theatres. These leisure facilities were the highest recorded destinations in the telephone survey out of centres within the Wiltshire Local Authority area, however, in all of the leisure sections (cinema, bowling, bingo, evening eating and drinking and theatres) Salisbury was not the highest performing centre. There is significant leakage of leisure trade from the Salisbury area to the centres of

Southampton, Bournemouth, Poole, Andover and Basingstoke. Within Salisbury there is some provision of quality cafes, restaurants and bars, although there is scope for further provision to enhance the evening offer and increase the number of visitors during the evening to claw back trade.

- In Chippenham, the main leisure provision comprises the Reel/Astoria Cinema, although the cinema is not the dominant centre for zone 22 within which Chippenham is located, instead, the Cineworld at Swindon attracts a higher number of visitors. The main competing centres which Chippenham is losing leisure trade to include Swindon, Bath, Stroud and Bristol. There is an opportunity to considerably enhance the leisure of the centre to compete more effectively with centres to the north and west of Wiltshire.
- Trowbridge has a similarly weak leisure provision, comprising the Arc cinema and theatre and eating and drinking facilities. The main centre outside of the Wiltshire study area that attracts a high number of people for both daytime and evening eating and drinking is Bath. Bath, Swindon and Bristol draw a significant amount of theatre, cinema, bowling, sports and leisure trade away from zones including and surrounding Trowbridge. A number of respondents living in the Trowbridge zone (zone 17) also use ten pin bowling facilities in Melksham.
- Other centres across Wiltshire provide a more limited leisure provision, which primarily cater for local needs. The main competing centres for leisure provision outside of the Local Authority area are Swindon and Bath, which draw trade out of the LPA area. Swindon and Bath performed strongly in the 2010 telephone survey results across all leisure sectors, which can in part be explained by survey area catchment overlaps.
- We estimate that there is strong growth in leisure expenditure, which indicates that there is the potential to provide additional leisure facilities in the Wiltshire's centres to support a more vibrant evening economy across the LPA area.

8. Conclusions

- 8.1 This section draws on our qualitative and quantitative analysis to consider and summarise the performance of each centre and the potential for accommodating new retail and leisure floorspace in the LPA area. We examine the key strategic centres of Salisbury, Chippenham and Trowbridge and the smaller market towns and village centres.
- 8.2 It is beyond the remit of this study to examine in detail the impact of every retail proposal coming forward in Wiltshire. However, where appropriate we have examined the key retail proposals in the LPA area, and provided broad views on the potential acceptability of these proposals.
- 8.3 Our conclusions below starts by assessing the scope for new retail floorspace coming forward in each of the Council's centres.

Scope for new retail floorspace in the Strategic Centres

Salisbury

- 8.4 Our previous review of Salisbury City Centre (Salisbury Retail Study 2006), along with our most recent assessment of the centre, has identified a healthy centre, performing well in a number of vitality and viability indicators. In particular, Salisbury is an attractive and historic city, with a high quality environment. It has a good range of national multiple retailers and key attractors, and a strong representation of small, specialist shops. Salisbury being the largest centre in Wiltshire performs a role not only as a retail destination, but also as a strong tourist and visitor destination, as well as an important employment centre.
- 8.5 We have, however, identified potential signs of vulnerability and barriers to growth, as well as opportunities to enhance and strengthen the centre over the forthcoming LDF period. The street pattern is complex and extensive, and pedestrian circulation is unlikely to penetrate all quarters, particularly by those who are unfamiliar with the centre. There are a number of key attractors missing, including department stores, and higher order and mainstream retailers which are represented in competing

centres such as Southampton. The centre also lacks a good array of modern/large unit sizes which could prevent new retailers from seeking representation in the centre in the future.

- 8.6 At present, Salisbury is not always the first choice shopping destination for shoppers to the centre with Southampton being a key draw for people in the area, which is not surprising given Southampton's higher position (14) in the retail rankings (Salisbury is 59). This position will only be exacerbated over the LDF period, as competing centres continue to improve and implement proposals in the pipeline. It is therefore crucial for Salisbury to encourage investment and new retailers to the centre in order to maintain its position amongst rival centres. It will be equally as crucial for any town centre development to happen in conjunction with protecting and enhancing the historic environment, tourist economy and differential/specialist retail offer.

Convenience Goods

- 8.7 The previous Salisbury Retail Study (2006) identified a proportion of convenience goods floorspace capacity in Salisbury up to 2021, and recommended enhancements should be made to city centre foodstore provision. However, the findings of this Retail Study indicate that capacity for convenience goods floorspace has decreased.
- 8.8 Based on the current performance of city centre and out-of-centre convenience goods floorspace, within the city's urban area, we have identified capacity for -293 sq m net of additional convenience goods floorspace during the period to 2015 which rises to 554 sq m net by 2020.
- 8.9 The Maltings and Central Car Park site is regarded as the primary retail development site in Salisbury in the Adopted Local Plan and South Wiltshire Core Strategy Submission Document (July 2009). We understand that development on the Maltings and Central Car Park site could include an enlarged foodstore, to what is currently there, and on the basis of current market shares it is apparent that the above capacity figures do not represent a significant uplift in convenience floorspace to support the provision of a significantly enlarged store. However, no account has been made in this assessment to claw-back trade from out of centre stores in the Salisbury area. Enhanced trade retention in the city centre by clawing back spend from stores outside of the town centre (Tesco/Waitrose) will offer further scope to

support further convenience floorspace above what is identified in the baseline assessment.

- 8.10 The provision of a new foodstore to serve the city centre will bring about associated benefits such as generating linked trips to the wider city centre uses, by clawing back more shoppers to the town centre which are otherwise using supermarket provision outside of the centre. However, for such benefits to be fully realised the design of any potential retail development is of critical importance and must integrate fully within the existing fabric of the centre.
- 8.11 The positioning of an enhanced food store at the Malting site will therefore need to ensure that it has due regard to the creation of clear pedestrian flows and be not isolated from existing retail provision thereby encouraging linked trips. If successfully achieved this will help to support and improve the existing business community. If suitably integrated, it will enhance the centre's attraction and act as a catalyst for wider benefits by generating higher levels of footfall with the potential for spin-off spend to other businesses and uses.
- 8.12 Our qualitative and quantitative analysis has identified no scope for further out of centre floorspace to come forward outside of Salisbury. Therefore the key priority for the Council in relation to convenience goods in Salisbury is the delivery of a foodstore on the Maltings and Central Car Park site. If proposals do come forward for further foodstore proposals in edge of/out of centre locations then these will have to be rigorously tested in terms of their compliance with the key tests of PPS4, which includes an assessment of the effect it could have on its delivery of this key town centre development opportunity site.

Comparison Goods

- 8.13 The previous Salisbury Retail Study (2006) identified significant scope to provide additional comparison retail floorspace in the city centre up to 2021. The previous Study recommended that space should be provided for higher order and quality retailers. The findings of this Study also identify capacity for comparison floorspace in Salisbury as discussed below.
- 8.14 Our capacity projections identify scope for additional comparison goods floorspace in Salisbury City Centre over the forthcoming LDF period. On the basis it is able to
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maintain market share in the face of growing competition, we estimate capacity for circa 2,475 sq m net of comparison goods floorspace by 2010 rising to 12,168 sq m net by 2020.

- 8.15 At present, Salisbury's urban area (both city centre/out of centre floorspace) retains circa 10% of total available comparison goods expenditure within the survey area. The remaining trade is being directed towards other centres within Wiltshire, competing centres in the wider sub-region and out-of-centre retail warehousing. Following implementation of town centre schemes in competing centres, it is possible that Salisbury's market share could erode as shoppers change their centre of preference. It will be important for Salisbury to enhance and consolidate its role to prevent such an outcome.
- 8.16 As discussed above, the key development priority in Salisbury is the development of the Maltings and Central Car Park site. Policy CP7 of the South Wiltshire Core Strategy Proposed Submission Document (July 2009) identifies the extent of the Malting/Central Car Park site and the scale and character of development likely to be appropriate. In particular, it identifies that alongside a replacement foodstore (discuss above) the site is appropriate for department store and other comparison shopping needs, including a arrange of unit sizes including a mix of large and small units, with the potential for a total of 40,000 sq m of retail floorspace (gross).
- 8.17 Our health check analysis of Salisbury did indicate a lack of good modern retail units for existing retailers and new entrants to occupy and expand their operations. The Malting site offers the opportunity for Salisbury to address this issue and provide modern space for retailers to locate into. Until such modern unit configurations are provided, there is a risk that retailers could be forced out of Salisbury city centre to relocate in other competing centres or to out of centre locations.
- 8.18 Thus the opportunity to redevelop this site should be fundamental to the Council's forthcoming Core Strategy in order to maintain and enhance the vitality and viability of the city centre. This is particularly relevant given that the site represents a significant and underused asset, and is of a scale which is unusual within a central location in an otherwise generally constrained historic city centre. We therefore consider it essential that this opportunity continues to be identified as a strategic allocation in the forthcoming Core Strategy.

- 8.19 The overall findings of this study highlight that the combination of the Maltings and Central Car Park site, and the extant consent for bulky goods retailing on London Road provide for the immediate range and choice of sites which are capable of meeting Salisbury's identified quantitative and qualitative needs. The scale of the Maltings and Central Car Park development, which should be informed by detailed retail market demand analysis, will determine whether Salisbury can elevate its position to compete more effectively with other adjoining competing centres.

Chippenham

- 8.20 Our qualitative assessment set out in Section 5 to this study, identified Chippenham as a healthy vital and viable centre, with a good range of mainstream retailers which predominantly serve its local catchment area well for lower to middle order comparison goods.
- 8.21 The centre, with a reasonable mix of mainstream multiple retailers, is performing well in the face of strong competition from the higher order centres of Bath and Swindon and is considered to be vital and viable. Chippenham is one of the largest centres in Wiltshire after Salisbury, although it is different to Salisbury in terms of the scale, quality and character of its retail offer. We consider the priority for Chippenham over the LDF period should be to encourage its local population to use the town centre more frequently as their preferred shopping destination and to provide retail units of sufficient size and configuration to accommodate retailers who are seeking larger units.
- 8.22 It is also considered that improvements could be made to the street scene and general environment, particularly focussed around the river, to make Chippenham a more attractive place to shop in line with the Vision for Chippenham (2008). The addition of good quality cafés and restaurants with outdoor seating areas would add to the vibrancy of the centre, increase dwell time and encourage shoppers to visit Chippenham to use food and drink units. Our review of the centre also identified a lack of restaurant/cafe offer in the centre. Improvements in this area would help to attract people into the centre beyond the core hours of 'nine to five' and to create an inclusive evening economy.

8.23 Vacancy levels in the centre are also low and there is a good level of retailer interest in the town; however, our assessment has identified a clear shortage of modern units to meet the demand which increases the risk of retailers seeking opportunities outside of the centre.

8.24 It is also clear from the in centre survey results that Chippenham is not the first choice shopping destination for clothing and footwear goods, with the shoppers instead choosing to travel further to higher order destinations such as Swindon and Bath.

Convenience Goods

8.25 The previous North Wiltshire Retail Needs Assessment (2007) identified capacity for some additional convenience goods floorspace up to 2026, and that Chippenham, as the largest centre in the study area, should be the focus of this development to enhance and support the role of this centre. However, the findings of this Retail Study identify a smaller proportion of convenience goods capacity over the study period.

8.26 As previously highlighted, the out of centre provision around Chippenham is dominant and performing well. As a result of this over trading, in this Retail Study we identify capacity for additional convenience floorspace of 703 sq m net by 2015 which rises to 1,338 sq m net by 2020.

8.27 The priority for Chippenham over the LDF period should be to encourage the local population to use the town centre more frequently and the provision of further convenience floorspace in the town centre will help to achieve this objective.

8.28 We understand the key site identified for development in the town centre is the Bath Road Car Park/Bridge Centre site to the west of the primary retail area, which effectively forms an edge of centre site. Policy R3 of the adopted Local Plan 2006 states that this site would be a suitable location for A1, A2 and A3 uses as a natural extension to the town centre. This should continue to be the Council's key priority for enhancing the retail offer in the centre and deliver the convenience floorspace identified.

8.29 We understand that the proposals are expected to include a convenience store although the scale is yet to be determined. The two sites are estimated to have a combined area of at least 14,702 sq m, dependent on highway design. If

appropriately integrated with direct linkages to the primary shopping area of the town such a store would help to improve convenience trade retention and support and contribute to the wider retail offer through linked trips. Whilst the site is allocated in the Local Plan, it is unclear whether the impact of this 'edge of centre' site coming forward for retail development has been appropriately tested on the primary shopping area of Trowbridge.

- 8.30 Chippenham is well served by out of centre foodstores in the form of Sainsbury's and Morrison's. On this basis, we consider that the Council should be careful in considering permitting any further convenience which could take further trade away from the town centre. As acknowledged above, we consider that further, well integrated, convenience provision in the town centre (PSA) would benefit Chippenham and increase trade retention levels.

Comparison Goods

- 8.31 The previous North Wiltshire Retail Needs Assessment identified a significant amount of comparison goods retail capacity up to 2026 that should be delivered in the north Wiltshire centres, focusing on supporting and enhancing the role of Chippenham town centre. Similarly, this Retail Study identifies capacity in Chippenham for comparison goods floorspace up to 2020.
- 8.32 With regard to comparison goods retailing in Chippenham, our assessment indicates a good trading performance for the comparison offer in the town centre with a sales density of £7,657 per sq m net (based on town centre floorspace only).
- 8.33 Based on current market shares we estimate capacity in the town's overall urban area to support an additional 3,181 sq m net by 2015 which we estimate will rise to 7,975 sq m net by 2020. As with Salisbury, if appropriate development sites came forward in the centre (Primary Shopping Area), there could be scope to increase the proportion of comparison floorspace space beyond the identified capacity figures through claw-back of spend from centres such as Bath and Swindon, as assessed in Section 6. This would need to be tested on an individual basis throughout the LDF period.
- 8.34 As discussed above, it is apparent that the key development priority in Chippenham is the Bath Road Car Park/Bridge Centre and the development of this site, provided it is

effectively integrated with the existing PSA of Chippenham, should be a strategic priority for the centre. Depending on the scale of comparison provision coming forward on the site, it is likely to capture a large proportion of the available capacity identified in our projections. Overall, the development of this site could help to retain more comparison expenditure in the town centre.

Trowbridge

- 8.35 Trowbridge, which is located to the south of Chippenham, has similar characteristics and appears to be performing a similar role to Chippenham in the local hierarchy. The centre benefits from a wide variety of mainstream multiple retailers providing a good range of convenience and comparison offer. Whilst performing a similar role to Chippenham, the centre has a larger proportion of comparison floorspace compared with its neighbouring centre, which is reflected in the centre's higher comparison turnover and position higher up the retail rankings. The two shopping centres; The Shires and Castle Place and pedestrianised areas of the centre provide an attractive environment for shoppers. There is a strong mix of comparison, convenience and service uses and only a slightly above average number of vacant units
- 8.36 Overall, the retail offer in Trowbridge provides the local shopping catchment and tourist population with a good range of shopping facilities; however, like Chippenham, it faces strong competition from nearby centres, such as Bath, which provides a more extensive and better quality range of retail outlets consistent with its higher order role.

Convenience Goods

- 8.37 The previous West Wiltshire Needs Study (2007) found that there was no surplus convenience goods capacity in Trowbridge up to 2017. Similarly, our assessment has identified limited capacity for further convenience goods floorspace.
- 8.38 Our qualitative review of convenience provision in Trowbridge highlights a strong representation of offer for local residents with three of the 'big 4' supermarkets occupying large stores in and around the centre. On this basis, it is clear that there is no qualitative deficiency in foodstore provision in Trowbridge and on the back of the urban area's strong convenience offer, it is therefore not unexpected that our

capacity assessment indicates a significant negative supply of residual spend to support any further convenience provision in the centre.

- 8.39 In terms of development proposals coming forward, we understand that options are currently being explored for the St Stephen's Place site, which adjoins Castle Place Shopping Centre to the south of the town centre. The site is vacant and has been derelict since Tesco moved out of the town centre to County Way in 1993. We understand that a development brief has been agreed for the site which is considered to offer very significant potential for town centre retail/leisure uses and residential development.
- 8.40 It will be important for any retail scheme coming forward on this edge of centre site to encompass and creates direct linkages with Castle Place shopping centre, which has suffered in terms of lack of footfall ever since Tesco moved from the site. It is unclear the scale/type of retail which is being examined to come forward on the St Stephens site; however, if effectively integrated with the existing town centre offer, we consider that further convenience provision which helps to enhance the vitality and viability of this part of the centre could be supported through claw-back of trade from out of centre foodstores surrounding the centre. This could in turn help to enhance convenience trade retention levels in the town centre.
- 8.41 Like Chippenham, we consider that Trowbridge is well supported by out of centre foodstores. Any proposals for further convenience floorspace which will have an impact on Trowbridge town centre should be strongly resisted, but any further convenience floorspace which improves trade retention levels and increases market share in the centre (PSA) should be actively encouraged.

Comparison Goods

- 8.42 The previous West Wiltshire Retail Needs Study found that there was capacity to support and retain existing comparison goods expenditure in Trowbridge town centre up to 2017. Similarly, this Retail Study identifies capacity for further comparison goods floorspace in Trowbridge town centre.
- 8.43 Our assessment of comparison offer in Trowbridge, similar to Chippenham, identifies a strong trading performance for the centre with a sales density of £7,438 per sq m net (based on town centre floorspace only). Taking into account both the performance

of town centre and out of centre floorspace we estimate there is capacity to support an additional 3,746 sq m net by 2015, rising to 11,169 sq m net by 2020.

- 8.44 Our qualitative assessment of Trowbridge indicated a strong performing centre within its current role with no demonstrable need for any significant uplift in comparison floorspace in the centre. We consider that in the first instance, the Council should focus on promoting the development of St Stephen's Place for mixed use development which could include a proportion of comparison floorspace. The proportion of comparison floorspace likely to come forward on the site will need to be appropriately tested in line with PPS4. It is vital that any development on this site is appropriately integrated with the existing PSA, which, as discussed, could include potential improvements to the comparison offer within Castle Place shopping centre.
- 8.45 The St Stephen's Place site is evidently in need of regeneration and it should therefore remain a key priority for the Council to seek to deliver this site over the plan period.

Market Towns

- 8.46 Our assessment of the other smaller market towns in Wiltshire indicates that they are all performing their more localised function reasonably well, providing the local residential catchments for their day-to-day convenience, service and community needs. Each centre has its own distinctive character and retail offer, with some performing more of a higher order role which is reflected in their comparison offer and trading performance. We examine each centre in turn focusing first on the more dominant centres:

Devizes

- The centre sits just below the tier of major centres as the next most dominant centre in Wiltshire in terms of floorspace and trading performance. The centre has a strong convenience offer with the centre anchored by a Sainsbury's, Somerfield and a Morrison's to the edge of the centre. However, the results of the telephone survey suggest that the convenience offer in the centre is performing slightly below company average levels.
- On this basis, we identify no scope to accommodate further convenience floorspace in the centre and the Council should therefore not seek to actively

encourage any allocation of sites for this category of floorspace. It is also apparent that the centre is retaining a high proportion of main food shopping trips from Zone 15 which appears to limit the potential to claw-back shoppers to support further convenience provision. On this basis, the Council should not actively seek to improve Devizes' market share for convenience provision. Any out of centre proposals for such floorspace should be carefully considered in terms of the impact it could have on provision in the town centre.

- In relation to comparison goods, our capacity assessment identifies scope to accommodate 839 sq m net by 2015, which rises to 2020 by 2,125 sq m net. It was apparent from our qualitative review of the centre that as a result of the irregular street pattern and historic nature of many buildings within Devizes the opportunities to assemble sites of sufficient size that are viable to redevelop are limited. However, there are potential sites which could be explored for future development including the development of West Central car park behind Lloyds TSB Bank to the east to Market Place and also the Central car park site behind Tesco to the rear (south) of the Brittox. Both sites could be intensified to increase the scale of retail provision in the centre provided they are successfully integrated with the existing fabric of the centre.
- The in-centre survey revealed that Devizes is predominantly not people's usual first choice destination for clothing and footwear with the majority (84%) of shoppers choosing destinations such as Trowbridge and Swindon. Devizes, located 11 miles to the east of Trowbridge, should certainly not seek to elevate its position to sit alongside Trowbridge in the local retail hierarchy.

Marlborough

- Marlborough is generally considered a healthy town centre which offers a good range of retail and services including an above average proportion of comparison shopping outlets. However, our convenience assessment reveals that the offer in the centre is under-trading, particularly the Waitrose store in the centre.
- The approval of Tesco at Marlborough Business Park in April 2010 has resulted in a negative supply of available spend to support further floorspace in the centre. We would not recommend that the Council actively seeks to allocate any further sites for convenience provision in the centre or tries to improve Marlborough's

market share for convenience goods by permitting further convenience provision in out of centre locations.

- Our review of Marlborough's comparison offer indicates that the centre has a good mix of independent and national multiple retailers and the centre appeared busy and vibrant on our site visit. On the basis of its current performance, we estimate capacity to support a small proportion of comparison floorspace with 373 sq m identified by 2015, which is expected to rise to 938 sq m net by 2020. Given the role and function of Marlborough should actively seek to focus any further comparison floorspace in the centre beyond the floorspace identified.

Melksham

- Our assessment of Melksham has identified a relatively healthy centre providing a good range of comparison and convenience retailers for its size. We consider that Melksham is well provided for in terms of convenience floorspace, and the centre offer has recently been enhanced by the opening of Waitrose in the former Somerfield store. The urban area's convenience offer will also be enhanced when Asda opens off Bradford Road to the south of the town centre. On this basis, we consider there will be limited scope for further convenience provision within the centre throughout the LDF period nor should the Council seek to improve Melksham's convenience offer any further until the Asda has opened and its trading effects are properly assessed.
- Our quantitative assessment of the performance of Melksham's comparison offer has identified a strong performance for a centre of its size. We have identified capacity for 839 sq m net of further comparison floorspace by 2015, which rises to 2,125 sq m net by 2020. Our qualitative review of the centre has highlighted that the only real potential to increase the range of comparison floorspace in the centre is by exploring the option of developing the area behind the Avon Place shopping Parade for further retail floorspace, which could improve the comparison retail offer of the centre and meet the identified need for further comparison floorspace by 2020.

Warminster

- Our review of Warminster highlights that the centre offers a good range of convenience and comparison goods and is performing well in both categories. The previous Retail Study for West Wiltshire (2007) considered there to be neither a qualitative deficiency in foodstore provision in Warminster nor any substantial quantitative need for further convenience floorspace. The findings of this latest study concur with the previous review, particularly given that planning permission has been granted for a Waitrose store. There is therefore no apparent need for any further enhancements to be made to the centre's convenience offer and this is reflected in the negative residual spend to support further convenience floorspace.
- With regard to the scope for further comparison goods in the centre, our capacity projections identify the potential to accommodate 537 sq m net by 2015, which is expected to increase to 1,891 sq m net by 2020. We understand that a Town Plan is being prepared for the centre, which identifies opportunities to rationalise the central car park area with the potential for this location to provide a further enhancement of retail provision in the centre. The development of this site could in turn help to deliver improvements to the retail offer in the Three Horseshoes Mall which sits adjacent to this site.
- Provided this site is effectively integrated within the existing fabric of the centre, we consider this site would be the most suitable location to deliver further comparison provision within the centre. It is clear that this under-used site offers a unique opportunity to improve the retail offer to enhance the vitality and viability of the town centre.

Other Market Towns

- 8.47 The remaining centres in Wiltshire are performing at a lower level in terms of comparison goods, and are mainly providing for the convenience/service needs of local residents. Some centres such as Bradford on Avon, Calne and Corsham attract a number of visitors due to the historic nature of the centres and specifically cater for this trade by containing a number of independent specialist units such as art and antique dealers.

- 8.48 Whilst a small proportion of capacity is arising for comparison goods in some of these centres this is fairly minimal and we therefore do not envisage any significant scope for further comparison floorspace, beyond small scale infill and the re-occupation of vacant units. This is mainly due to the current role they perform, the lack of available sites and their proximity to the higher order centres. The aim should therefore be the protection of their existing retail function, and the Council should seek to manage this through specific retail frontage policies.
- 8.49 Whilst our qualitative review of the centres in Section 6 highlights several potential opportunity sites which come forward for 'main town centre uses' we consider that these sites are unlikely to offer substantial scope to improve the comparison goods offer of the centres due to lack of comparison retailer interest in these smaller centres. Instead, they are more likely to come forward for mixed-use development which could include a small proportion of comparison floorspace.
- 8.50 Therefore, our review of the remaining centres (below) focuses primarily on the performance of these centres in terms of convenience goods and the scope to accommodate further such floorspace.

Amesbury

- The retail composition of Amesbury is consistent with our expectations of a centre performing a more local shopping function, i.e. the proportion of convenience and service retailers is above average, while the proportion of comparison units is below.
- The centre has a well below average number of comparison units, with a poor representation clothing stores. The majority of units are for service provision, including a high number of hotels and pubs with hotels. Vacancy rates are also above average, and some of these are dominant units on main streets. Recently works to widen pavements in the area around the new Co-op have improved the quality of the town centre and the environment is well maintained.
- Since the previous Salisbury Retail Study (2006) was undertaken the centre has seen the development of the new Co-op in the town centre and the opening of the Lidl store to the north east of the town centre. More significantly, planning permission has also been granted at appeal for a new out of centre Tesco on

London Road to the north east of the town, which opened in late 2010. On the basis of this new floorspace provision we identify no further capacity for any further convenience provision.

- There could be scope for small scale convenience floorspace to further enhance the centre's vitality and viability, but any further out of centre provision, particularly convenience floorspace, will not be supportable following the arrival of Tesco. The Council should therefore not actively allocate sites to accommodate any further convenience provision in the centre. In order to negate any potential impact that Tesco could have on the centre, the Council's aim throughout the LDF period should be to protect the existing retailer function of Amesbury through environmental improvements and implement policies to resist further out of centre floorspace which have a detrimental impact on the centre.

Bradford on Avon

- Bradford on Avon is a historic town with irregular street patterns, which provide variety and attractiveness to the centre. The town performs the function of a local service centre as well as catering for the high proportion of visitors, with a strong provision of independent specialist shops. Overall the town seems to be relatively healthy, although improvements can be made to the shopping offer as well as dealing with the particular traffic congestion issues which the centre experiences at peak times, which would improve the physical environment.
- The centre benefits from its attractive historic environment which attracts a number of tourists to the centre, although there are problems which need to be addressed namely the traffic congestion issues in the centre. Our qualitative review of the centre has highlighted a fairly limited convenience offer in the town centre, with the out of centre Sainsbury's to the south of centre attracting the main proportion of main food shopping trips from the centre's location Zone (19). Based on current market shares our assessment has identified scope for a small proportion of convenience floorspace by 2015 (213 sq m net).
- We understand an application is currently being determined for development to provide a mixed use scheme including residential development, offices and retail on the Kingston Mills site in the centre. We understand that 352 sq m of convenience floorspace is proposed which if granted will take up the residual

capacity for convenience goods in the centre and would result in no further convenience floorspace needed. However, it is unlikely that a foodstore of this scale would considerably enhance the market share of the centre and the Council should examine sites to potentially further enhance this, whilst having regard to the impact this could have on existing provision.

Calne

- Our review of Calne has identified a centre performing well for its size and position adjoining Chippenham, with a good provision of convenience floorspace. The town centre environment varies across the town; Church Street being an attractive area of the town, with the quality deteriorating in the area around Somerfield. Convenience provision in the centre is provided by Sainsbury's to the east of the centre which was extended in 2007 and Somerfield in the town centre.
- On the basis of current market shares we identify scope for 756 sq m net of further convenience provision by 2015. This could offer the potential for a small scale quality foodstore, or an extension to the existing offer, which could enhance the choice in retail offer, improve the centre's market share and enhance the vitality and viability of Calne. All 'in centre' options should be explored in the centre to accommodate this identified need.

Corsham

- The centre of Corsham benefits from an attractive historic centre which draws a number of visitors into the centre. Convenience goods provision includes a Co-op and other local food retailers. This mix of units indicates that the centre is performing healthily. The retail offer of Corsham is dominated by local independent retailers, providing a unique retail offer. Corsham also benefits from tourist trade visitor, which improves the centres vitality and viability.
- Our review did identify a fairly weak convenience offer in the centre with the only key anchor being a Co-op (formerly Somerfield), which anchors the Martingate centre off the High Street. The telephone survey results suggests that the centre's convenience floorspace is under-performing against company average levels and on this basis we therefore identify no scope for further convenience provision based on current performance. However, on a qualitative basis it is apparent that

the centre lacks a main foodstore destination with people instead choosing to travel to the two out of centre stores outside Chippenham for main food shopping. Therefore, if an appropriate site came forward in the town centre we consider Corsham should seek to improve its market share and claw-back trade from Chippenham.

Cricklade

- The market town of Cricklade is one of the smallest towns in Wiltshire. Our qualitative review of the centre found that there was only one vacant unit, indicating that the centre is performing well for its size, whilst the environmental quality of the centre is good. The convenience offer is fairly limited although the current provision, including the Tesco Express on High Street, appears to be performing well against company average levels. Not surprisingly, due to the nature and scale of the centre it is retaining very little convenience provision in its location Zone (25), with most main food shopping trips undertaken in Cirencester and Swindon we identify no scope for further convenience provision in the centre.
- Given the constrained nature of the centre we consider it unlikely to be able accommodate a foodstore of a sufficient size to reduce the flow of expenditure to nearby centres. However, if a suitable site came forward this should be examined to accommodate further convenience provision which could increase the market share of the centre. The scale of such a store would need to be examined in more detail as a separate exercise, taking into account the key tests of PPS4.

Ludgershall

- Our review of the town found a strong representation of service and convenience units, and a low representation of comparison retailers which are generally located in a rather disjointed manner throughout the centre. The convenience offer in Ludgershall appears to be performing broadly in line with what we expect the centre to be trading at when compared against company average levels. The Co-op (formerly Somerfield) appears to be trading well, although it performs more of a top up shopping role rather than catering for main food shopping trips. Main food shopping trips from Zone 11 are going to the Tesco on Station Road in

Tidworth, which is not surprising given the distance of Ludgershall to Tidworth, and also to convenience provision in Andover, approximately 8 miles away. On this basis, our capacity exercise identifies limited scope for further convenience provision in the centre. We consider that Tidworth should remain the principal centre for convenience goods in this part of Wiltshire.

Malmesbury

- Malmesbury has a good mix of retail and service uses, although we did identify a below average convenience unit representation, although the centre does have a reasonable representation of multiple comparison retailers including Boots, WH Smith and Clarks Shoes which is good for a town of Malmesbury's size.
- The centre is lacking in terms of current convenience offer in the town centre. The centre does have an out of centre Somerfield which helps to retain some main food shopping trips in the centre's location zone. On the basis of current market shares to Malmesbury, we identify capacity by 2015 for just under 209 sq m of convenience floorspace in the centre. However, we consider there is scope to claw-back more spend to Zone 26 which could increase the proportion of floorspace available in Malmesbury and consequently improve its market share. However, our qualitative review of the centre did identify a lack of available sites due to the historical nature of the centre's street pattern which could potentially restrict the provision of further foodstore provision coming forward within the existing confines of the town centre.

Tidworth

- Our review of the centre found that service uses dominate the town centre offer, and convenience units have an above average representation, including Lidl and Tesco stores. The Tesco development on Station Road has brought physical enhancements and an increase in shop units in the town, although some of these units are still vacant. These units contribute to the overall vacancy rate in the centre which is high. There is a deficiency in comparison retail provision, which is significantly below the national average, however given its role in the hierarchy we consider that there is no need to specifically seek to increase the proportion of

comparison floorspace in the centre. Our review did identify areas of improvement could be made to the environment around Zouch Market.

- The telephone survey results suggest that the Tesco store anchoring the centre is under-performing compared with company average levels. On this basis, our quantitative assessment indicates that there is no further scope to support any further convenience provision in the centre. The Council should therefore be resistant to permitting any further convenience provision which could impact on the performance of the centre/store.

Westbury

- Our qualitative review of Westbury found that over half of the units in the centre are occupied by service units. This high proportion results in a poor mix of retail units, with the number of convenience and comparison units below average, with only one major supermarket, Morrison's. Vacancy levels are broadly in line with the national average and raise few concerns for the health of the centre. The majority of the traffic is routed around the town centre, which results in a quieter shopping environment which is separated from the surrounding residential areas. The quality of the environment is varied, with high quality buildings that are generally well maintained in the north and dated, poorly maintained buildings on the High Street.
- Our quantitative assessment indicates that there is no capacity for any further convenience floorspace in Westbury. This is mainly as a result of the under-performance of the existing convenience offer in the centre and the incorporation of the commitment for an Aldi on Warminster Road to the south of centre, which obtained planning permission in April 2009. The centre struggles from its position in between Warminster and Trowbridge and the telephone survey indicates that main food shopping trips are leaking from Westbury's location zone (Zone 16) to these two centres, which is not surprising given the stronger comparison/convenience offer present there. Overall, we consider that Westbury is retaining a sufficient proportion of convenience expenditure for its role and function and on this basis the Council should not actively seek to improve its market share for convenience goods.

- In terms of development opportunities in the centre, we understand an opportunity to improve the retail offer could arise by removing the existing precinct and combining this with the adjacent BT telephone exchange building to the south of High Street. A more detailed assessment would need to be carried out to assess the deliverability of this key site and the development costs involved with bringing it forward.

Wootton Bassett

- Our qualitative review of the centre has identified a very strong representation of comparison and convenience units. The level of vacancy rates is below the national average which indicates that the town is performing strongly.
- On the basis of current market shares, we identify no capacity for further convenience provision in Wootton Bassett over the LDF period. However, we have identified that the centre is struggling to retain main food shopping trips in its location Zone (23), with the larger Sainsbury's in Calne being the preferred destination for main food shopping trips within this zone. If an appropriate site comes forward for further convenience floorspace in the centre (PSA) there may be scope to improve its market share/convenience trade retention levels through claw-back of spend. This will depend on the scale of store proposed and this would need to be assessed in greater detail as a separate assessment.

Village Centres

8.51 The health checks of the smaller centres identified vital and viable shopping and service destinations. Downton, Mere, Pewsey, Tisbury and Wilton all perform well as local village centres, offering essential 'everyday' requirements to a local catchment. Each centre has a local top-up foodstore, Post Office, pharmacy and bank. All of the village centres benefit from library facilities, and Downton and Pewsey also have sport and leisure facilities. Vacancy rates are particularly low in every centre (excluding Pewsey which is slightly above average). Pewsey and Wilton are the largest and busiest centres offering the greatest range of comparison units. Downton and Tisbury are the smallest centres in the survey area and they appeared the most rural and quiet villages with little through traffic, whilst Mere is slightly larger and is an attractive and vibrant centre with good pedestrian footfall.

- 8.52 Each centre performs a local shopping function, and they do not appear particularly vulnerable to decline at the current time. It is also apparent that growth is unlikely over the forthcoming LDF period given their current function, built environment and rural 'village' settings. Overall, these centres provide a necessary service within the local community and a social forum, especially for the less mobile and those without private transport.

Out of centre proposals

- 8.53 Our review of existing out-of-centre provision suggests there is already an extensive range and choice of out-of-centre retailing, particularly around the major centres. The guiding strategy for the Council should be to seek to redirect current and future comparison retail spending towards sites within, or failing that on the edge of town centres. Any exceptions to this principle would have to be judged against national and local policies, including consideration of the sequential approach and impact tests.
- 8.54 There may be pressure for further comparison retail development outside of the centres (Primary Shopping Area) throughout the LDF period. Our study has not identified any need for further out of centre development to come forward in any centre and on this basis the Council should seek to resist any proposals that would cause detrimental impact on the trading performance of any of Wiltshire's centres.

Eating / Drinking / Entertainment Uses

Major Centres

- 8.55 In Salisbury our assessment has highlighted a significant leakage of leisure trade from the Salisbury area to the centres of Southampton, Bournemouth, Poole, Andover and Basingstoke. Within Salisbury there is some provision of quality cafes, restaurants and bars, although there is scope for further provision to enhance the evening offer and increase the number of visitors during the evening to claw back trade.
- 8.56 In Chippenham, the main leisure provision comprises the Reel/Astoria Cinema, although the cinema is the not the dominant centre for zone 22 within which Chippenham is located, instead, the Cineworld at Swindon attracts a higher number

of visitors. The main competing centres which Chippenham is losing leisure trade to include Swindon, Bath, Stroud and Bristol. There is an opportunity to considerably enhance the leisure offer of the centre to compete more effectively with centres to the north and west of Wiltshire.

- 8.57 Trowbridge has a similarly weak leisure provision, comprising the Arc cinema and theatre and eating and drinking facilities. The main centre outside of the Wiltshire study area that attracts a high number of people for both daytime and evening eating and drinking is Bath. Bath, Swindon and Bristol draw a significant amount of theatre, cinema, bowling, sports and leisure trade away from zones including and surrounding Trowbridge. A number of respondents living in the Trowbridge zone (zone 17) also use ten pin bowling facilities in Melksham.
- 8.58 It is evident from the household survey that the key destinations for restaurants and eating out are the larger centres of Bath, Swindon and Salisbury; however, it is apparent that Trowbridge and Chippenham do attract people within the core zones surrounding the centres.
- 8.59 There is scope to promote a greater mix of uses in the major centres to retain footfall during the day and improve the vitality and viability of the centres in the evening. We would recommend future planning policy frameworks and allocations focus promoting new areas for more eating and family friendly destinations to ensure the maximum mix of uses and increased visitor numbers. It is likely that standard mainstream restaurant chains will be achievable within these centres. However, further commercial demand analysis would need to be carried out to properly ascertain the standard of facilities likely to be viable, and this will of course depend on the current economic climate.
- 8.60 With regards to leisure proposals coming forward, we understand that the Waterside development in Trowbridge, which was expected to include a range of new leisure uses including a range of new restaurants/bowling complex and cinema, is currently on hold as a result of the developer for the site Modus going into administration. We understand that a new scheme is being developed for a leisure campus on the library site, which will be integrated with the County Hall upgrade. A separate scheme is likely to come forward for the development of a cinema and other mixed uses on the former Tesco site.

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- 8.61 In terms of other proposals, we consider there could be scope to enhance leisure uses within the Maltings and Central Car Park Development site, alongside the proposed retail uses, whilst the Waterfront site in Chippenham, in line with the Vision for the centre, could offer the opportunity to enhance the restaurant/cafe offer in the centre.

Market Towns

- 8.62 While we anticipate mainstream commercial leisure requirements such as cinemas will gravitate towards the stronger centres e.g. Salisbury, Trowbridge and Chippenham, growth in consumer expenditure on eating and drinking provides an opportunity to supplement the traditional convenience and local services role of the smaller town centres to underpin the rural economy.
- 8.63 Evidently, there are centres which provide more a tourist function including Bradford, Calne and Corsham and provide appropriate restaurant and café facilities to support their function. However, we have highlighted a contrast in leisure provision between some of the larger market towns with our qualitative review of Devizes highlighting a good provision of restaurants, whilst there is an under provision of bars and restaurants in Warminster.
- 8.64 We consider that the Wiltshire Core Strategy should provide a supportive framework for leisure and associated uses within all the market towns. Whilst one of the key drivers in the commercial leisure sector will always be market demand, a formulation of flexible site and policy allocations can assist in facilitating investment and encouraging a greater mix of uses. However, due to their scale and localised function, a pragmatic stance needs to be taken over the scope for further leisure provision in the smaller market towns, as multiple leisure (food and drink) operators generally seek representation in larger centres, adjoining other uses e.g. cinemas.
- 8.65 However, these smaller centres should certainly seek to improve their independent café/restaurant offer to support the tourist nature of certain centres particularly Calne, Corsham and Bradford on Avon.

9. Recommendations

9.1 In this section we provide strategic recommendations for the Wiltshire centres. Our recommendations on the retail hierarchy and frontages policies for each centre are identified in Appendix 7.

Key recommendations for Wiltshire's Centres

9.2 Based on our qualitative and quantitative review of the centre's retail and leisure provision we bring together our conclusions to summarise the key recommendations for the centres over the LDF period.

Major Centres

- Salisbury, Chippenham and Trowbridge should strengthen their roles as comparison goods shopping destinations, preventing any increase in leakage of trade to other competing centres.
- We consider it is appropriate to seek to focus the majority of higher order comparison retail spending growth into Salisbury, Trowbridge and Chippenham, within the hierarchy to enhance their vitality and viability.
- The development of the Maltings and Central Car Park site in Salisbury and St Stephen's Place in Trowbridge are a key priority for the Council over the LDF period.
- Overall, the three major centres should aim to provide more modern larger retail units over the LDF period to generate retailer interest, enhance the environment, improve linkages and pedestrian circulation throughout the centres which will help prevent retailers from seeking representation in out of centre locations which can provide flexible larger units sizes.
- The Council should identify and allocate sites in the centres to accommodate the future needs and requirements of retail/leisure operators, particularly the high proportion of fashion retailers that are not currently represented in the centres.
- The LDF and future strategy for three centres should also focus on enhancing the physical environment and facilitate pedestrian movement around the centres

and provide initiatives to maintain and improve shop frontages. Shop front improvements should be a priority in Chippenham during the LDF period.

- The major towns would benefit from a diversification of evening economy uses to provide high quality leisure development to complement the existing retail offer and contribute to maintaining and strengthening their role in the regional leisure economy. This will have the effect of attracting a new mix of visitors and increasing frequency of trips.

Other Market Towns

- The overall strategy should be to refurbish/redevelop and consolidate in the central areas of the centres including the re-occupation of a number of vacant units in the centres. We have considered the possible development opportunities in Devizes, Melksham Warminster and Westbury and these proposals should be fully explored to enhance the retail/leisure offer of the centres provided they comply with the tests of PPS4.
- The vacancy rates in the centres should be monitored and it may be appropriate to consider the conversion of long term vacant units in the secondary shopping areas of the centres particularly in Devizes, Amesbury, Bradford on Avon, Tidworth and Warminster.
- Vacancies in centres where new out of centre foodstores have recently been granted including Amesbury, Marlborough, and Melksham should be closely monitored.
- Other additional small scale extensions to existing retail development or infill development should also be encouraged to in order to consolidate the centres over the LDF period. We therefore recommend that the Council carefully monitors changes in vacancies in the centre over time to help measure the impact of new policies and investment.
- The environmental quality and pedestrian environment of each centre should be enhanced over the LDF period. This particularly relevant in centres which need protecting from out of centre development such as Amesbury.
- Dependent on the scale, size and role of the centre the smaller centres should look to develop their specialist niche leisure offer e.g. restaurants, cafes and pubs to complement the major centre's more dominant leisure offer. This should be

particularly relevant for the centres of Bradford on Avon, Calne and Corsham which attract a number of tourists.

- The Council should resist any out of centre foodstore and non-food proposals in the catchment areas of the centres that would cause detrimental impact on their trading performance.

Smaller Village Centres

- A policy should be put in place to ensure the network of local centres provides easily accessible shopping to meet people's day-to-day needs and should be the focus for investment in more accessible local services and the mix of uses in local centres should be carefully managed.
- The vacancy rates in the centres should be monitored and it may be appropriate to consider the conversion of long term vacant units in the secondary shopping areas of the centres.

General Recommendation

9.3 We consider that it would be appropriate to set a lower impact threshold than the default level of 2,500 sq. m. gross indicated in PPS4. This is mainly because Wiltshire includes a number of smaller centres and villages and there would be a concern at the potential impact of developments below this threshold particularly on local centres and villages. This is specifically anticipated in policy EC13.1 of PPS4 and these concerns could arise in the case of proposals materially lower than the threshold, suggested in PPS4. There is also a concern that a succession of applications, each individually below the 2,500sq.m gross threshold, could cumulatively lead to significant adverse impacts as outlined above.

9.4 In these circumstances, we consider that:

- Any proposals not within the Primary Shopping Area should be supported by an assessment of their impact, and in accordance with PPS4, any proposals involving the creation of more than 200sq.m gross additional floorspace should be required to demonstrate compliance with the sequential approach in accordance with the guidance in PPS4.

Proposed Retail Hierarchy

9.5 Taking account of the qualitative and quantitative performance of each centre we have assessed what we consider to be an appropriate retail hierarchy for Wiltshire's centres. We have drawn on a range of indicators to inform our recommendations on the retail hierarchy including the proportion of comparison/convenience floorspace, number of units, turnover of the centres and their spatial relationship with one another and centres outside the study area. The proposed retail hierarchy is outlined in Table 9.1 below.

Table 9.1: Proposed Wiltshire Retail Hierarchy

Centre	Recommended Position in Retail Hierarchy
Salisbury	Strategic Growth Centre
Trowbridge	Strategic Growth Centre
Chippenham	Strategic Growth Centre
Devizes	Town Centre (Market Town)
Warminster	Town Centre (Market Town)
Marlborough	Town Centre (Market Town)
Melksham	Town Centre (Market Town)
Amesbury	Town Centre (Market Town)
Bradford on Avon	Town Centre (Market Town)
Calne	Town Centre (Market Town)
Corsham	Town Centre (Market Town)
Malmesbury	Town Centre (Market Town)
Westbury	Town Centre (Market Town)
Wootton Bassett	Town Centre (Market Town)
Tidworth	Town Centre (Market Town)
Cricklade	District Centre (Village Centre)
Downton	District Centre (Village Centre)
Ludgershall	District Centre (Village Centre)

Mere	District Centre (Village Centre)
Pewsey	District Centre (Village Centre)
Tisbury	District Centre (Village Centre)
Wilton	District Centre (Village Centre)

- 9.6 It is evident from our detailed analysis that a number of the centres in the hierarchy are performing different roles with clearly some centres attracting a significantly higher proportion of retail trade than others. We consider that Salisbury, Trowbridge and Chippenham due to their size, trade draw and retail/leisure offer should continue to be defined at the top of the hierarchy as 'Strategic Growth Centres'. In accordance with PPS4 (Annex B), Salisbury strictly speaking should be regarded as a 'City Centre', with Trowbridge and Chippenham regarded as 'Major town centres'. However, due to the nature and scale of the centres and the overall proposals coming forward we consider that these three centres should be defined in the same tier.
- 9.7 In the case of the other market towns, whilst we recognise the diverse range and size of the centres identified their differing retail offer, we consider the majority would be appropriately defined within the Core Strategy as 'town centres' (Market Towns). Overall, we do not consider there to be any practical merit in sub-dividing these into different tiers. However, we consider that it may be appropriate to re-designate Cricklade and Ludgershall to a lower tier of 'district centre' (Village Centre) based on their size and more limited function in comparison with other centres.
- 9.8 The third tier of the proposed retail hierarchy are the large villages, which we classify as 'district centre' (Village Centre). These centres provide a more limited range of shops and facilities, which are of a more local nature, serving a small catchment. Although these Village Centres vary in size and number of retail units, we consider that the centres cater for local need and should be defined in the same tier.