

# **SALISBURY DISTRICT COUNCIL**

Retail and Leisure Needs Study

October 2006



**Ref:** Planning/643/Projects/02A624046  
**Contact:** Chris Goddard / Caroline Cusa  
**Tel:** 020 7911 2202 / 020 7911 2551  
**E-mail:** [chris.goddard@gvagrimsley.co.uk](mailto:chris.goddard@gvagrimsley.co.uk)  
[caroline.cusa@gvagrimsley.co.uk](mailto:caroline.cusa@gvagrimsley.co.uk)

**Signed:**

**For & On Behalf of  
GVA Grimley LLP**

10 Stratton Street  
London  
W1J 8JR

0870 900 8990  
[www.gvagrimsley.co.uk](http://www.gvagrimsley.co.uk)

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# EXECUTIVE SUMMARY

## Introduction

1. GVA Grimley was instructed in June 2006 by Salisbury District Council to undertake a Retail and Leisure Needs Assessment for Salisbury District Council. The purpose of the study is to provide a context for policies and proposals within the forthcoming Local Development Framework for the District, with particular reference to the amount of floorspace that needs to be allocated for future retail and leisure development.
2. Our terms of reference were to: -
  - Establish the extent to which the current retail and leisure provision in the District satisfies the level and nature of consumer demand within each catchment;
  - Estimate the scale and nature of any changes in this position that may arise in the light of:
    - Potential increases in population;
    - Forecast changes in retail and leisure expenditure;
    - Changing forms of retail and leisure provision; and
    - Possible increases or decreases in the trade draw from competing centres.
  - Identify the scale and nature of additional retail and leisure provision that may be appropriate in the District to the period 2011, 2016 and 2021;
  - Assess the scope for new retail development and the potential to accommodate this within the District.
3. In order to address the requirements of the Brief, our 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. We draw on a household telephone survey, town centre health checks, a review of out-of-centre and competing retail and leisure provision, retail and leisure capacity assessments, and a review of potential development opportunities.

## Policy Framework

4. The central objective of PPS6 is to promote the vitality and viability of town centres by planning for the growth of existing centres, through expansion of existing boundaries if necessary, and enhancing existing centres by promoting them as the focus for new development. New planning regulations now control the development of internal mezzanine floorspace, and the Use Classes Order has

recently been revised to enable local authorities to manage uses more effectively, thus protecting the vitality and viability of town centres.

5. The South West RSS identifies no retail hierarchy and instead designates 23 Strategically Significant Cities and Towns – Salisbury is among this list. More specifically Salisbury is identified as an important employment, tourism and retail centre, although opportunities for outward expansion are considered limited given the Area of Outstanding Natural Beauty.
6. The Local Plan identifies Salisbury as the largest and principal shopping centre in the district. Amesbury is the second largest settlement and Wilton, Tisbury, Downton and Mere are designated as smaller centres, but are not defined in accordance with definitions set out in PPS6. Primary and Secondary shopping frontages are identified on the proposal maps, and the status of allocated development sites are discussed in Section 9.

## **National Retail/Leisure Trends**

7. National retail trends indicate a continued growth in incomes and expenditure, albeit not at such strong levels as in the last 15-20 years. The growth in expenditure is focused on comparison goods with virtually no increase in convenience goods expenditure.
8. Increased car ownership has resulted in greater household mobility and therefore the choices for shopping centres to visit and the distances that can be travelled are much greater. Internet shopping has grown phenomenally in the last few years and looks set to continue in certain sectors.
9. The foodstore operators have continued to evolve their formats and offer. With restrictions on out-of-centre stores growing, and changing socio-economic trends, several large operators have returned to the high street with small convenience stores. Operators are also seeking to extend their comparison goods offer, turning stores into variety or mini department stores. This trend in out-of-centre locations could pose a threat to smaller centres, where the large out-of-centre stores become one stop shopping destinations negating trips to the town centres.
10. 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 they have suffered. The focus on urban renewal has increased demand for town centre sites for a wider range of land uses.
11. Since the mid-90s, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. Mixed-use retail and leisure development has proved to be a real growth area in town centres. These trends present significant opportunities and challenges to Salisbury's centres and in particular Salisbury. The centre is well placed to benefit from forecast spending growth but it needs to adapt if it is to capitalise on these opportunities, and maintain and enhance its position within the wider region.

12. In the commercial leisure sector, changing social and demographic trends and increased personal disposable income will fuel sustained growth in mainstream commercial leisure activities, including cinemas, bars, restaurants and post deregulation, significant additional investment in the gambling and entertainment industry. As a consequence of market trends and policy, many main stream leisure activities, including the cinema, are increasingly returning to traditional town centre locations.

## **Sub-Regional Context**

13. In terms of the sub-regional context, the Household Telephone Survey has identified Southampton, Bath, Trowbridge, Swindon, Yeovil, Andover, Poole and Bournemouth as the key competing centres. It is clear that Southampton is the greatest threat given its trade draw, scale and quality of retail offer, rents, proximity, rank position and major development opportunities coming forward over the forthcoming LDF period. Southampton, Bath and Bournemouth are stronger than Salisbury in terms of retail space, Prime Zone A Retail Rents and retailer demand for space, although trade draw to Bath and Bournemouth is more limited given their distance from Salisbury.
14. 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. Salisbury is not, however, far behind the stronger centres, and Javelin actually ranks Salisbury marginally higher than Swindon and Bournemouth based on mix of retailer.
15. 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. Shoppers and visitors come to Salisbury for a variety of reasons, not just shopping which other competing centres rely upon. Salisbury should retain its recognised identity.

## **Salisbury City Centre: Health Check**

16. 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.
17. Our analysis identifies a vital and viable town centre. The number of comparison outlets is above the national average, the proportion of vacant units is well below the national average, rents have risen in recent years, yields have remained static and demand from retailers for space has increased. The city centre has a good mix of leisure activities including a cinema, night-club, bingo hall, health & fitness club and a theatre. Pedestrian footfall has increased across the centre and overall crime

figures have fallen. Shoppers particularly like the environment, the range of well-known/multiple retailers and good selection of independent and specialist stores.

18. 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 proportion of menswear units is below the national average.
19. Retailer demand has risen, but the quality of requirements is not sufficient to fill the gaps in provision. Developments in the pipeline will, however, stimulate demand, and we consider Salisbury would be a destination of choice for a number of retailers if the opportunity arose. Vacancy rates are below the national average, but this represents a barrier to growth, i.e. there is no space for new retailers to enhance provision. At present, Salisbury is not a first choice shopping destination for a number of shoppers who instead choose to visit competing centres such as Southampton. Without new development in Salisbury, this position will only be exacerbated over the LDF period, as competing centres continue to improve and implement proposals in the pipeline. Our analysis has also identified a weak usage of the centre in the evenings.

## **Local Centres: Health Checks**

20. Overall, the small centres in the District form attractive and traditional towns and villages, and the quality of the environment is excellent in each.
21. Our assessment of Amesbury has identified a relatively healthy town centre, which has experienced substantial investment in recent years. In particular, a replacement Co-Op store is now under construction and an attractive mixed use residential and retail scheme has been completed on the junction of High Street and London Road. The retail composition in the centre 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 monthly market and vacancy rates are significantly below national average levels.
22. Downton, Mere, Tisbury and Wilton all perform well as local village centres offering no more than essential 'everyday' requirements to a local catchment. Each centre has a Post Office, pharmacy and local top-up foodstore. Vacancy rates are particularly low in every centre. Wilton is the largest and busiest centre offering the greatest range of comparison units. Tisbury and Downton appeared the most rural and quiet villages with little through traffic, and Mere is an attractive and vibrant centre with good pedestrian footfall. Each centre performs a local shopping function, and they do not appear

vulnerable in the current circumstances. It is also apparent that growth is also unlikely over the forthcoming LDF period given their current function and built environment.

## Out of Centre Retail Provision

23. Salisbury has two main edge/out-of-town foodstores. The Tesco store is trading well, and is modern in format and appearance. An extension is currently under construction which will broaden the range of non-food goods, although the proportion is conditioned in the consent. A further application (Ref: S/2006/1740) has been submitted to amend the extension floorspace, resulting in a small net decrease in additional sales floorspace. Waitrose 'Home and Food' is also modern in format and appearance and was busy on the day of the site visit. Referred to as edge-of-centre, the store sells a strong range of non-food 'homeware' products.
24. The main concentration of retail warehousing in the District is dispersed along Southampton Road to the south east of Salisbury City Centre. There is no dominant retail park in Salisbury, and instead retailers are located on freestanding sites or small groupings. A former MFI unit on the Dolphin Retail Park and a unit adjacent to Waitrose are currently vacant. There is one commitment for additional bulky goods retail warehousing on a site on London Road. The implications of this are discussed further in later sections.

## Capacity Projections

25. Our capacity projections indicate that the total population of the survey area is forecast to grow from 561,987 in 2006 to 634,305 in 2021 - a strong increase of 13%. Convenience goods expenditure is expected to increase from £890.7m in 2006 to £1,115m by 2021. In the comparison sector, higher growth rates illustrate that spending will increase from £1,635m in 2006 to £3,469m in 2021 - an overall increase of £1,834m (or 112%).
26. Our analysis has indicated residual capacity to support additional retail floorspace over the forthcoming LDF period. These baseline capacity figures are illustrated in Tables 1-4 for convenience and comparison goods. They highlighted capacity to supposed additional floorspace based on current market shares, and have taken into consideration commitments. If new development proposals come forward above these levels, the issue of claw back (i.e. increasing market share) would need to be taken into consideration.

**Table 1: Convenience Goods Baseline Capacity Projections (£000)**

| Area                  | 2011 (£000) | 2016 (£000) | 2021 (£000) |
|-----------------------|-------------|-------------|-------------|
| Total District        | 15,165      | 26,229      | 37,901      |
| Salisbury City Centre | 2,616       | 11,780      | 21,449      |
| Amesbury Town Centre  | -1,307      | -295        | 781         |

**Table 2: Convenience Goods Baseline Capacity Projections (sq m net)**

| Area                  | 2011 (Sq m net) | 2016 (Sq m net) | 2021 (Sq m net) |
|-----------------------|-----------------|-----------------|-----------------|
| Total District        | 1,516           | 2,623           | 3,790           |
| Salisbury City Centre | 262             | 1,178           | 2,145           |
| Amesbury Town Centre  | -131            | -29             | 78              |

**Table 3: Comparison Goods Baseline Capacity Projections (£000)**

| Area                  | 2011 (£000) | 2016 (£000) | 2021 (£000) |
|-----------------------|-------------|-------------|-------------|
| Total District        | 55,752      | 150,771     | 282,136     |
| Salisbury City Centre | 33,327      | 97,616      | 185,490     |
| Amesbury Town Centre  | 582         | 1,386       | 2,469       |

**Table 4: Comparison Goods Baseline Capacity Projections (sq m net)**

| Area                  | 2011 (Sq m net) | 2016 (Sq m net) | 2021 (Sq m net) |
|-----------------------|-----------------|-----------------|-----------------|
| Total District        | 9,181           | 22,488          | 38,115          |
| Salisbury City Centre | 5,031           | 13,346          | 22,970          |
| Amesbury Town Centre  | 117             | 253             | 408             |

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## Scope for New Development and Recommendations

27. Drawing on our qualitative and quantitative analysis, this section considers the scope for accommodating new retail development in the district. We examine Salisbury City Centre, Amesbury Town Centre, and the smaller villages assessed in this report in turn.

### Salisbury City Centre

28. 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 any town centre development to happen in conjunction with protecting and enhancing the historic environment, tourist economy and differential/specialist retail offer. Protecting and enhancing the city's identity is equally as crucial as attracting new investment in order to maintain its higher order position in the sub-regional retail hierarchy.

### *Convenience Goods*

29. In terms of convenience goods, our analysis has highlighted reasonably good foodstore provision in the town centre. This includes the large format J Sainsbury's in the Maltings, and the Tesco Metro and Marks & Spencer foodhall. The qualitative assessment identified that the J Sainsbury was relatively quiet, and the Tesco Metro and M&S were both busy. We consider this may have been a consequence of the timing of the site visit, i.e. in the middle of a weekday. J Sainsbury may be busier during the evenings and weekends when shoppers are undertaking their main food shopping trip, although it did appear that the store was not performing as well as comparable stores elsewhere in the sub-region and UK which are of a similar scale.
30. The quantitative analysis supports the qualitative findings. The results suggest that J Sainsbury is performing in line with estimated company averages, and Tesco and M&S are performing marginally below expected trading levels. Nevertheless, we would expect a store the size of J Sainsbury, in a city centre location with ample parking, to be trading considerably better than identified in our qualitative and quantitative assessment. This may partly be a consequence of the difficulties of access to the first floor location of the current supermarket site.
31. Nearby, the Tesco on Southampton Road is trading well, and the Waitrose on Churchill Way is trading marginally above expecting company averages. 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 262 sq m net of additional convenience goods floorspace during the period to 2011. The figures indicate that there will be capacity for an additional 1,178 sq m net by 2016, and 2,145 sq m net by 2021.

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32. We understand that Tesco on Southampton Road has recently submitted a planning application to revise the scheme currently under construction (Ref: S/06/1740). This involves a net reduction in retail floorspace and as a consequence the proposals have already met the key policy tests.
  33. The Maltings site is regarded as the primary retail development site for Salisbury in the Adopted Local Plan and remains a City Centre retail site in the Replacement Local Plan. The Planning Brief published in January 2001 recognises that the Maltings is crucial to the vitality and viability of Salisbury City Centre and its continued success as a retail, entertainment, employment, tourist and residential centre, is to a large extent dependent on the levels of attractiveness of the Maltings area to shoppers and visitors to the city centre.
  34. Planning consent was subsequently granted in June 2003 (Ref: S/2002/0802) for the redevelopment of The Maltings. Whilst planning permission has been granted to redevelop the Maltings, agreement has yet to be reached on the terms of the Section 106 Agreement and land ownership issues. If the current proposal is not implemented as approved, the Council, at a meeting of Cabinet earlier this year, has indicated that it is still committed to the redevelopment of The Maltings including a larger foodstore. We consider that the Council should maintain this objective over the forthcoming LDF period and be particularly cautious in terms of new out-of-centre foodstore proposals and extensions given the negligible identified capacity. The cumulative effect of city centre and out-of-centre development is likely to result in unacceptable impact on the network of centres in the district.

#### *Comparison Goods*

35. Driven by a strong forecast growth in retail expenditure and growing competition in the wider sub-region, we consider there is potential to increase, improve and consolidate comparison goods retail floorspace in Salisbury City Centre. In particular, there is a need to bring forward development proposals to stimulate demand from higher order, mainstream and quality comparison goods retailers to fill the gaps in provision. This will be important if Salisbury is to maintain its position as a higher order centre in the sub-regional hierarchy as envisaged in the RSS.
36. The Household Telephone Survey highlights the strong trading performance of the City Centre. With a current turnover of £280.8m, including a 15% inflow from beyond the survey area boundary, the centre has a sales density of £8,722 per sq m net. Based on our experience elsewhere, we consider that Salisbury is performing well in this sector, within expected levels of between £6,000 - £9,000 per sq m net. These figures emphasise the strong trading performance of the City Centre.
37. Capacity projections identify capacity for additional comparison goods floorspace in Salisbury City Centre over the forthcoming LDF period. On the basis it is able to maintain market share in the face of growing competition, we estimate capacity for circa 5,031 sq m net of comparison goods floorspace by 2009, 13,346 sq m net by 2011 and 22,970 sq m net by 2021.
38. At present, Salisbury retains circa 15% of total available comparison goods expenditure within the survey area. The remaining trade is being directed towards the competing centres in the wider sub-

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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.

39. It is evident that Salisbury City Centre has a number of different shopping areas, both primary and secondary, which also vary in footfall and character quite significantly. The centre varies from the historical central streets of Butcher Row and Ox Row, the more modern Maltings development to the west of the centre, The Old George Mall shopping centre in the south west of the centre, The Cross Keys Mall adjacent to the Market Place, and independent character streets such as Fisherton Street, Castle Street, Winchester Street and Milford Street. The challenge over the forthcoming LDF period will be to implement new development to suit the requirements of modern format retailers, while maintaining the cohesion of the centre and quality of these different character areas.
40. Any work commissioned by the local authority to review potential development opportunities in more detail should not consider 'stand alone' sites, and should review the city centre boundary as a whole and the implications of development in one area on other areas. Area Action Plans can be effective means with which to consider the future of town and city centres as a whole, and covers issues such as transport/accessibility, car parking, linkages and connectivity, as well development opportunities in more detail. Any further work should be underpinned by a requirement to maintain the city's historic identity, protect independent and specialist retailers, and enhance the quality of the built environment. This is crucial to maintain its differentiation from competing centres in the sub-region.
41. We consider that the city centre boundary remains appropriate over the forthcoming LDF period, and primary and secondary retail frontages should be maintained. Within policy formulation, the council should take advantage to recent changes in the Use Classes Order which has introduced a more detailed hierarchy of 'A retail uses' in order to control the introduction of hot food takeaways and drinking establishments.
42. Given its special character and range and choice of specialist and independent shops, we recommend that consideration is given to designated Fisherton Street as a special policy area to protect existing uses, to maintain and enhance the quality of the environment and prevent the introduction of inappropriate hot food takeaways.
43. We have identified a number of sites/areas in the city centre that have the potential to accommodate development or redevelopment which would contribute to meeting Salisbury's long term comparison shopping and other needs. The future of these areas and implementation of schemes warrants detailed consideration given the limited nature of available sites to expand/enhance the city centre, and these development opportunity areas should not be wasted in light of growing competition in the wider sub-region. Any schemes which compromise an optimum solution, in terms of poor linkages and piecemeal development should be strongly resisted.

44. The overall objectives 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. Sites considered suitable for development in Salisbury City Centre include the following:-

- The Maltings
- Brown Street Car Park
- Salt Lane Car Park
- Wiltshire and Dorset Bus Station
- Land Bound by Scots Lane and Blue Boar Row

#### *Leisure Quarter*

45. It is clear from our analysis that the majority of respondents from the telephone and in-centre surveys do not visit Salisbury City Centre in the evening for leisure uses. This is likely to be a consequence of the relatively limited range of evening economy activities. Evidence suggests that a strong town centre leisure economy increases trip time and the overall attractiveness of a town centre. The convenience of a strong mix of town centre uses also increases trip frequency. As discussed in Section 5, we consider there is capacity for an additional 5-7 cinema screens, and other commercial leisure facilities if the market demand is there. Policy should aim to ensure flexibility through encouraging mixed use retail/leisure schemes whilst protecting A1 shop uses in Primary Shopping Frontages.

46. As such, we recommend the Council gives detailed consideration to allocating an appropriate site for leisure based development. At present, the Odeon cinema and Gala Bingo Hall occupy tight spaces which consequently compromise the quality of offer they provide. They are also sites that would be entirely appropriate for retail uses, and if redevelopment did come forward it would help enhance retail provision in the city centre. Relocation of the cinema could enable Marks & Spencer to expand and enhance its position as a key attractor and anchor retailer in the city centre.

47. The viability of a leisure quarter should be given further detailed consideration by the Council, particularly if Salisbury is to maintain its role as a higher order centre as envisaged in the RSS, and if it is to compete effectively with other centres in the sub-region. Potential sites that could be included in mixed use policy areas include:

- The Maltings/Central Car Park;
- The Brown Street Car Park;

- The Wiltshire and Dorset Bus Station, in consultation with Wiltshire and Dorset County Council's.
48. Salisbury should be promoted as the main focus for retail and leisure activity over the forthcoming LDF period. New development on specific sites should not, however, be considered in isolation from the rest of the city centre. Linkages and integration of different sites and schemes should underpin the future of the city centre, and one option to achieve this comprehensive approach is an Area Action Plan. This approach will consider all of the key issues comprehensively, including transport/accessibility, pedestrian circulation and connectivity, linkages and signage and development opportunity sites.

## Amesbury

49. Our assessment of Amesbury has identified a relatively healthy town centre, which has experienced substantial investment in recent years. In particular, a replacement Co-Op store has recently opened and an attractive mixed use residential and retail scheme has been completed on the junction of High Street and London Road. The retail composition in the centre 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 monthly market and vacancy rates are significantly below national average levels. On this basis, and given the scale and mix of uses, we recommend that Amesbury is defined as a Town Centre over the forthcoming LDF period.
50. In terms of convenience goods the replacement Co-Op foodstore, which has recently opened, will contribute significantly to the health of the centre and its overall attractiveness as a shopping destination. At present, a proportion of trade within Amesbury's core catchment area is being directed towards competing foodstore destinations, outlined in Table 5. Any proposals for new foodstore development should take into consideration these market shares and consequent impact upon them.

**Table 5: Key Foodstore Market Shares in Zone 2**

| Foodstore                         | Zone 2 Market Share |
|-----------------------------------|---------------------|
| Foodstores: Amesbury Town Centre  | 24%                 |
| Foodstores: Salisbury Town Centre | 12%                 |
| Tesco, Southampton Road           | 15%                 |
| Waitrose, Churchill Way           | 11%                 |

51. Based on current market shares, we do not consider there is a need for a foodstore over the forthcoming LDF period in Amesbury town centre or the wider urban area. The objective should be to enhance the town centre, and support the role of the new Co-Op foodstore in underpinning the vitality

and viability of the town centre. Our health check has identified the strong convenience and service role of Amesbury, and the weak comparison goods sector. Any competing out-of-centre foodstore provision is likely to result in an unacceptable impact on the town centre key role. If foodstore provision in the town centre is undermined, the role of other sectors is not sufficiently strong to maintain the centres health.

52. Our figures indicate a negative capacity of -29 sq m net by 2016. While a new foodstore in the urban area could claw back some trade lost to other out-of-centre foodstores in the district, we believe such a development will also impact substantially on the town centre. If an appropriate site came forward in the town centre for new foodstore development, we consider that Amesbury could support additional foodstore development through claw back and uplift in market share. Given leakage of trade to competing out of centre foodstore, we consider it possible that an appropriate foodstore development in Amesbury town centre could recapture lost expenditure.
53. We understand from the Council that is evident development pressures from food retailers in out-of-centre locations in Zone 2, i.e. in Amesbury's catchment area. As a consequence, given our findings in relation to limited capacity, we have tested two scenarios to review the impact of an out-of-centre foodstore on current shopping patterns in and around Amesbury. Following discussions with the Council we have tested the impact of two different sized units: 1,800 sq m net and 2,500 sq m net. While our overall conclusion is that the Council should adopt a cautious approach to new out of centre foodstore development, and these scenarios do not convey any support to either size of unit, it is necessary to quantify a scale of development for the purposes of impact testing to enable the Council to make informed decisions.
54. It is clear that the 2,500 sq m net foodstore will have a greater impact on existing town centres. We estimate a 1,800 sq m net foodstore will have a 4.4% impact on Salisbury City Centre, an 8.1% impact on out of centre foodstores in Salisbury's urban area, and a 33.2% impact on Amesbury town centre. The 2,500 sq m net foodstore will have a 5.8% impact on Salisbury City Centre, a 10.3% impact on out of centre foodstores, and a 37% impact on Amesbury town centre.
55. Clearly, at 33.2% and 37% respectively, the impact of a large out of centre foodstore on Amesbury town centre is significant. It is likely that a new out of centre foodstore will generate more sustainable travel patterns, ensuring that residents in the north of the district are not having to drive to major foodstore destinations in Salisbury town centre and the out of centre foodstore provision. A larger store would also improve access to a better range of food and non food goods. However, If located outside the town centre, a new foodstore will have a detrimental impact on the health of Amesbury town centre which has recently been enhanced following the opening of a replacement Co-Op foodstore.
56. As you would expect, the Household Telephone Survey highlights the relatively weak trading performance of comparison goods floorspace in the town centre. This is entirely consistent with our qualitative assessment which identified the below national average representation of comparison

goods retailers. As we have already pointed out, Amesbury functions largely as a convenience and service centre. Based on current market shares, our quantitative analysis has identified capacity for an additional 158 sq m net of comparison goods floorspace by 2011, 341 sq m net by 2016, and 550 sq m net by 2021. Our assessment has not identified retailer requirements for space in the centre.

57. We consider the town centre boundary and designation of retail frontages are appropriate for the forthcoming LDF period. In terms of development opportunities, the foodstore site allocated in the adopted Local Plan (2003) has now been brought forward for development, and there are no evident development sites to allocate. The town centre bus station could come forward for development, provided a replacement facility was identified beyond the town centre boundary. This option may be discussed in the Council's Transport Strategy. We would envisage small-scale infill development and redevelopment over the forthcoming LDF period.
58. While we consider frontage designations are appropriate for the forthcoming LDF period, it is prudent to mention the recently introduced Use Classes Order, enabling local authorities to allow a certain level of A3 quality restaurant and café uses, while preventing undesirable drinking establishments and hot food takeaways in certain locations. Given the current health of the town centre, we believe the local authority should encourage A1 shop uses in the primary frontages, whilst managing a more flexible representation in secondary shopping frontages. For example, retail policies could restrict the proportion of A5 uses, while encouraging A3 uses in certain locations to encourage longer trip times.

### Smaller Centres

59. The health checks of the smaller centres identified vital and viable shopping and service destinations. Downton, Mere, Tisbury and Wilton all perform well as local village centres offering no more than essential 'everyday' requirements to a local catchment. Each centre has a Post Office, pharmacy and local top-up foodstore. Vacancy rates are particularly low in every centre. Wilton is the largest and busiest centre offering the greatest range of comparison units. Tisbury and Downton appeared the most rural and quiet villages with little through traffic, and Mere is an attractive and vibrant centre with good pedestrian footfall.
60. Each centre performs a local shopping function, and they do not appear vulnerable to decline in the current circumstances. It is also apparent that growth is unlikely over the forthcoming LDF period given their current function, built environment and rural 'village' settings. As the adopted Local Plan points out, these centres provide a necessary service within the local community and a social forum, especially for the less mobile and those without private transport. The forthcoming LDF period should continue the Council's commitment to retain village shops and resist their change of use. Policy S9 set out in the adopted Local Plan (2003) should be retained.
61. We consider 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, such as health centres and other small scale community facilities, as

encouraged in PPS6. As such the mix of uses in local centres should be carefully managed. In addition to policy to manage the change of use of existing buildings, frontage policies could be introduced in the central shopping area to protect A1 shop uses and other important service facilities.

62. The new Use Class Order can restrict undesirable A5 Hot Food Takeaways within this core area, which will in turn maintain the quality of important service and shop uses in the centre. Resisting change of use in designated frontages, particularly to residential, will help the long term sustainability of the village centres as they aim to implement relevant strategies over the LDF period. If frontage policies are not put in place, the centre will continue to erode and undermine the overall health of the centres.

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# 1. INTRODUCTION

- 1.1 GVA Grimley was instructed in June 2006 by Salisbury District Council to undertake a Retail and Leisure Needs Assessment for Salisbury District Council. The purpose of this study is to provide a context for policies and proposals within the forthcoming Local Development Framework for the District, with particular reference to the amount of floorspace that needs to be allocated for future retail and leisure development.
- 1.2 Our terms of reference are to: -
- Establish the extent to which the current retail and leisure provision in the District satisfies the level and nature of consumer demand within each catchment;
  - Estimate the scale and nature of any changes in this position that may arise in the light of:
    - Potential increases in population;
    - Forecast changes in retail and leisure expenditure;
    - Changing forms of retail and leisure provision; and
    - Possible increases or decreases in the trade draw from competing centres.
  - Identify the scale and nature of additional retail and leisure provision that may be appropriate in the District to the period 2011, 2016 and 2021;
  - Assess the scope for new retail development and the potential to accommodate this within the District.
- 1.3 In order to address the requirements of the Brief, our 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. We draw on a household telephone survey, town centre health checks, a review of out-of-centre and competing retail and leisure provision, retail and leisure capacity assessments, and a review of potential development opportunities.
- 1.4 Health checks have been undertaken in Salisbury City Centre and in the smaller centres of the District drawing on the performance indicators set out in paragraph 4.4 of PPS6 and performance data analysis gathered by City Centre Management. These reviews inform the retail and leisure need assessments, highlighting the extent of deficiencies in the range, choice and distribution of existing provision in the District.
- 1.5 The quantitative capacity exercise draws on the household telephone survey to understand the current performance of the main shopping and leisure destinations in the District and inform the forecasts of future shop floorspace capacity. We drew on the in-centre survey to analysis inflows of

trade into Salisbury City Centre. The study also considers the scope to accommodate further new retail and leisure development in the District. This includes assessing the suitability, viability and availability of sites for new development. The results of the full analysis are drawn together to provide a set of recommendations and advice to feed into the Local Development Framework.

## Structure

- 1.6 The next section of this report sets out our review of national, strategic and local planning policies relevant to retail and leisure planning in the District. Section 3 highlights current retail and leisure trends, focusing on the likely implications for retailing within Salisbury District Council. In Section 4 we review the sub-regional context. This looks in particular at the influence of competing centres in the wider sub-region, and potential changes in influence in the future.
- 1.7 In Sections 5 and 6 we present our qualitative assessment of Salisbury City Centre and the five smaller centres in the District. We provide an overview of the Out of Centre retail provision in the District in Section 7, and in Section 8 we present our quantitative assessment and the potential for new retail and leisure development in the District. In Section 9 we consider the scope for new retail and leisure development and review development opportunities throughout the District.

## 2. POLICY FRAMEWORK

- 2.1 In this section, we examine the key points of relevance from national and regional planning policy, and the adopted Salisbury District Local Plan.

### **National Planning Policy**

- 2.2 Government guidance makes clear that sustainable development is the core principle underpinning planning. Accordingly PPS1 sets out a range of overarching policies aimed at facilitating sustainable patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community.
- 2.3 PPS6 reaffirms the Government's commitment to protecting/sustaining town centres. Accordingly the central objective of the guidance is to promote the vitality and viability of town centres by planning for the growth of existing centres and enhancing existing centres by promoting them as the focus for new development. Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for an extension to the primary shopping area. It makes clear that where reversing the decline in centres is not possible, local authorities should consider reclassifying such centres within the retail hierarchy.
- 2.4 In allocating sites and assessing proposed development, PPS6 requires local planning authorities to assess the need for the development; identify the appropriate scale, apply the sequential approach, assess the impact on existing centres; and ensure locations are accessible and well served by a choice of means of transport. Local planning authorities after considering these factors, should consider the degree to which other considerations such as physical regeneration, employment, economic growth and social inclusion are relevant.
- 2.5 PPS12 sets out the Government's policies on the preparation of local development documents which will comprise the Local Development Framework. PPS12 indicates that the statutory development plan documents will include a Core Strategy, site specific allocations and Area Action Plans.
- 2.6 The creation of additional floorspace within buildings was brought under control in May 2006 following consultation on the ODPM's report: 'Planning Control of Mezzanine and Other Internal Floorspace Additions' (March 2005). This was in response to concerns that the development of mezzanine floors in large retail stores significantly increased the available floorspace, thereby undermining the objectives of planning policy for the regeneration of town centres. The provision, incorporated within the 2004 Act does not seek to prevent such development, but to allow authorities to determine such proposals in the same way they would for external store expansion.

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- 2.7 Changes to the Use Classes Order (UCO) took effect on 21<sup>st</sup> April 2005, enabling local authorities to have more control to manage town centre development while minimising the proliferation of pubs, takeaways and night-clubs. Cafes and restaurants have retained their Class A3 classification, pubs and bars have been reclassified under a new Class A4, and takeaways have been reclassified under a new and separate Class A5. Night-clubs have been reclassified as Sui Generis.

## **South West Regional Spatial Strategy**

- 2.8 Regional policy is set out in the Draft Regional Spatial Strategy for the South West of England (RSS), June 2006. The RSS is expected to be the subject of an examination in public in Spring 2007, and the panel is due to issue its report in mid-2007. The final revised RSS is then expected to be issued in early 2008.
- 2.9 Policy SD4 sets out how the Plan seeks to achieve sustainable communities. The policy aims to achieve a sustainable relationship between jobs, homes and services and promotes a step change in public transport by managing demand for travel and promoting public transport hubs and access to them. Conserving and making the best use of existing infrastructure and reducing deprivation and inequalities are also key objectives in achieving sustainable development.
- 2.10 There is no defined retail hierarchy in the Spatial Strategy instead it identifies a number of Strategically Significant Cities and Towns (SSCTs). These key centres include Barnstaple, Bath, Bournemouth, Bridgewater, Bristol, Camborne/Pool/Redruth, Falmouth-Penryn, Truro, Cheltenham, Chippenham, Dorchester, Exeter, Gloucester, Plymouth, Poole, Salisbury, Swindon, Taunton, Torbay, Trowbridge, Western-super-Mare, Weymouth and Yeovil.
- 2.11 Development Plan Policy A sets out that provision will be made to maintain and enhance the strategic function of these centres by providing a wide range of commercial and public services, community and cultural services and non car links to the community they serve.
- 2.12 In relation to Salisbury, the Strategy acknowledges, in paragraph 4.3.15, that the City is a large free standing employment centre performing a traditional service role for the wider hinterland and a nationally important role as a tourism centre. In terms of its retail role the centre is designated as a 'quality regional town' with a high quality image and good demand for retail units. The Strategy recognises that there is limited potential for outward expansion due to the Areas of Outstanding Natural Beauty and flood risk factors. The objective is therefore to enable Salisbury to grow and prosper without compromising the integrity of environmental assets and avoiding flood risk areas.
- 2.13 The Strategy identifies Barnstaple, Bath, Bournemouth, Bristol, Cheltenham, Exeter, Gloucester, Plymouth, Poole, Salisbury, Swindon, Taunton, Torquay, Truro, Western-super-Mare and Yeovil as the main retail centres in the South West Region. The other major shopping centres include Cribbs Causeway and Clarks Village in central Somerset. The Strategy states that there is no current

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requirement for further out of town retail centres in the region and that any such development should be strongly resisted in line with PPS6.

- 2.14 Policy TC1 deals with town centres and identifies that the central areas of SSCTs will be the main focus for new investment in retail and other major facilities. The policy states that the scale of new investment in retail and other facilities within town centres should take full account of changing patterns of behaviour and future levels of population growth.
- 2.15 The general aim of the strategy is to locate development in line with the 'town centre first' sequential approach. It also recognises that individual centres have to ensure they maximise the opportunity to market themselves appropriately and that consideration is taken to improve people's accessibility to town centres and existing major out of centre retail locations by forms of travel other than the car.
- 2.16 Development Policy B deals with development in Market Towns. It sets out that the scale and mix of development should increase self containment of market towns with regards to service accessibility and regeneration needs. In general, new development should be specifically geared to meeting local objectives and addressing the impacts of larger shopping centres on local town centres.

## **Salisbury District Local Plan June 2003**

- 2.17 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. The relevant policies of the plan are set out in Appendix 10, and we summarise the key policies below.
- 2.18 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 local role in the provision of shopping these include Wilton, Tisbury, Downton and Mere and have more limited catchments than the two main centres.
- 2.19 The local plan sets out a strategy for shopping which includes:
- i) protecting and enhancing 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;

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- v) To exploit the opportunities remaining in city and town centres for new shops;
  - 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.
- 2.20 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 (See Appendix 10).
- 2.21 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.
- 2.22 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. The Maltings, which is covered by Policy S6, is expected to involve the redevelopment and enlargement of the existing foodstore. These two proposals are discussed further in Section 9.
- 2.23 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 is currently been developed for a new Co-op store and is discussed further in Section 9.
- 2.24 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.

## Summary

- 2.25 The central objective of PPS6 is to promote the vitality and viability of town centres by planning for the growth of existing centres, through expansion of existing boundaries if necessary, and enhancing existing centres by promoting them as the focus for new development. New planning regulations now control the development of internal mezzanine floorspace, and the Use Classes Order has

recently been revised to enable local authorities to manage uses more effectively, thus protecting the vitality and viability of town centres.

2.26 The South West RSS identifies no retail hierarchy and instead designates 23 Strategically Significant Cities and Towns – Salisbury is among this list. More specifically Salisbury is identified as an important employment, tourism and retail centre, although opportunities for outward expansion are considered limited given the Area of Outstanding Natural Beauty.

2.27 The Local Plan identifies Salisbury as the largest and principal shopping centre in the district. Amesbury is the second largest settlement and Wilton, Tisbury, Downton and Mere are designated as smaller centres, but are not defined in accordance with definitions set out in PPS6. Primary and Secondary shopping frontages are identified on the proposal maps, and the status of allocated development sites are discussed further in Section 9.

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## 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 Salisbury. A number of trends are likely to have a bearing on the future pattern of retail provision in the District, and the opportunities arising from development proposals. 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 relevance to Salisbury drawing from a range of published data sources, including research by Verdict Analysis, Mintel and the New Economics Foundation.

### Demographics

- 3.2 Over the last 20 years UK population has increased at about 0.3% pa but the number of households has increased by nearly three times that rate, as household size has decreased with smaller families, more divorces, people living longer etc. The population is also ageing. These trends are forecast to continue and will affect spending habits – how much we spend, on what and where.
- 3.3 Over the next 20 years the over 60's age group is expected to grow by 5.3m or 41% and the Under 60's age group by only 4%. Older shoppers have a younger mindset than in the past, are more fashion aware and financially better off as a result of house price growth as well as income growth (but pensions will be a concern). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Younger shoppers will have higher University fees to pay, will experience higher housing costs, will be more computer literate and spend more on-line, and will spend more on entertainment/leisure so they may have less to spend in the retail property sector.

### Income and Expenditure

- 3.4 Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. At the same time working hours for many, but by no means all employees have lengthened leading to a cash rich, time poor consumer. Overall retail expenditure has increased by about 4% pa in real terms over the last 20 years, with most of this growth on comparison goods rather than convenience goods, where growth has been less than 1% pa. Comparison goods growth has been close to 5% pa over the last 30 years, over 6% pa over the last 20 years and even stronger over the last 10 years. These strong trends are not expected to continue in the foreseeable future due to current high levels of consumer debt, an already low savings ratio and a weaker housing market. Over the next 5-10 years the latest economic forecasts suggest that comparison goods expenditure growth will be about 3.5-4.5% pa.

- 3.5 With longer working hours for many, shop opening hours in the larger centres have been extended and Sunday is now one of the strongest trading days in the week. This has implications for where retail expenditure is concentrated and the nature of some shopping trips which are considered to be a quasi leisure experience. Longer working hours, plus the Internet and broadband technology have lead to a huge growth in non-store shopping, but from a small base. Total non-store trading including mail order and the internet is currently estimated to be about 2.5% of convenience goods spending and about 6% of comparison goods spending. The latest forecasts suggest continuing strong growth over the next 5-10 years before a plateau is reached at about double current proportions of expenditure.

## Sales Density Increases

- 3.6 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. PPS6 (paragraph 2.34) requires that quantitative need/capacity assessments have regard to a realistic assessment of such improvement. Analysis of past data is difficult as over the last 20 years sales densities increases have been affected by changes in the use of retail floorspace, 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. In the future growth rates of 1.5-2.5% pa seem likely to be achieved for comparison goods, with minimal growth in sales densities for convenience goods.

## Employment

- 3.7 Over the last 20 years retail expenditure has increased at about 4% pa, but retail employment has increased much more slowly. Total employees in employment have increased from 2.1 million to 2.9 million, an increase of 1.75% pa. However, this growth has been in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2 million to 2.2 million, a 0.5% pa increase. Over the next 15 years Experian Business Strategies expect an overall decline in FTE employment with only a marginal increase in part time employment.

## Location

- 3.8 Strong income and expenditure growth has affected retailing in another important way – the rise in car ownership and mobility. Over the last 25 years the number of households owning one or more cars has increased from about 55% to about 75% and the number with two or more cars has nearly trebled from 11% to 30%. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater. These trends will continue but the rate of change may well diminish.

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- 3.9 Increased mobility and affluence has favoured larger centres over smaller centres. As a result larger centres have increased in size and importance relative to smaller centres which has further reinforced the attraction of larger centres to more mobile shoppers. Smaller centres have, therefore, lost market share and have seen much less new development than the overall rate of expenditure growth would imply. This is recognised by PPS6, which urges local authorities to be pro-active in trying to encourage development in smaller centres.
- 3.10 Increased mobility and affluence has also stimulated out-of-centre development, which has grown much more rapidly than town centre development. Over the last 20 years the majority of retail development has been in edge or out-of-centre locations. This has led to increasingly restrictive planning policy in favour of town centres over the last 10 years, but only recently has the growth in out-of-centre development started to slow. This slow down is expected to continue, but Verdict still expect sales at out-of-centre locations to increase at a faster rate than at in-centre locations.
- 3.11 PPS6 reinforces the Government's pro town centre. The sequential site test is still a cornerstone of retail planning policy, favouring town centre sites and necessitating consideration of the disaggregation of retail park proposals so that smaller sites are considered. However, it is also recognised that individual retailers business model are also relevant. Disaggregation of a retailer's proposed store does not now need to be considered if it would adversely affect the retailer's business model and increase costs.

## Size of Units

- 3.12 The growth of multiple traders and increased competition between companies has meant 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 sq m 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.
- 3.13 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 (green grocers, butchers, fishmongers, bakers etc), and a large increase of superstores. 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.

## Foodstores

- 3.14 A by product of the restriction of new development of large foodstores is the growth in applications to extend existing stores and the changing composition of floorspace within existing foodstores. There is an increasing emphasis on the sale of comparison goods at the expense of convenience goods, as

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expenditure growth rates for comparison goods are much higher than for convenience goods and margins are greater, although sales densities are often lower. 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.

## Shopping and Leisure

- 3.15 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. Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and 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 in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.
- 3.16 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 & fitness clubs, the attraction of the town centre is 'daytime trade' and the ability to capitalise on proximity to businesses and shoppers.

## Arts and Culture

- 3.17 Culture is a wide ranging term which brings together a range of interests and activities enjoyed by people including sports, media, entertainment, the arts, museums, libraries and tourism. Culture also encompasses the built heritage, parks and countryside. Overall, it is described as allowing people to celebrate local distinctiveness and traditions – the values that make a community what it is.
- 3.18 Research by the Arts Council in 2003 looking at attendance, participation in and attitudes towards the arts revealed that levels of attendance and participation in arts and cultural activities have remained high against a backdrop of increased competition from other leisure activities. The proportion of people attending at least one arts or cultural event rose from 79% in 2001 to 80% in 2003.

## Tourism

- 3.19 Tourism is one of the largest industries in the UK, accounting for 3.5% of the UK economy and worth approximately £74.2 billion in 2003. Around 2 million people (7% of the working population) work in

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the tourism sector in the UK. According to UKTS, UK residents took 126.6 million trips in 2004 and spent over £24 billion. This represents a 19% decrease in trips on 2003 and an 8% decline in expenditure over the same period. However, overseas visits to the UK are increasing, with a 9% increase between 1999 and 2004 and an increase in spending of 4%.

3.20 Some of the key factors influencing tourism trends are:

- Growing disposable incomes, increased overseas travel supplemented by short breaks in Europe and the UK;
- Increasing expectations in product quality;
- An ageing population with more flexibility for off peak travel;
- Changing consumer behaviour, with more frequent, short breaks and special interest holidays;
- Decreasing interest in traditional UK seaside holidays with more interest in urban destinations;
- Growing environmental concerns leading to more interest in walking, cycling, wildlife and remoter locations;
- Use of Internet to research, plan and make bookings direct with businesses at the destination; and
- A more volatile global environment, which can increase the attractiveness of UK domestic products but also lead to increased competition for our core markets.

3.21 National visitor trends in 2004 reported that the 2,099 visitor attractions in England showed an increase in attendance of 1% between 2003 and 2004. The majority of categories showed growth in 2004. The overall increase was driven by a recovery among urban attractions (+3%), which had experienced a slight decline in 2003.

## Summary

3.22 National retail trends indicate a continued growth in incomes and expenditure, albeit not at such strong levels as in the last 15-20 years. The growth in expenditure is focused on comparison goods with virtually no increase in convenience goods expenditure.

3.23 Increased car ownership has resulted in greater household mobility and therefore the choices for shopping centres to visit and the distances that can be travelled are much greater. Internet shopping has grown phenomenally in the last few years and looks set to continue in certain sectors.

3.24 The foodstore operators have continued to evolve their formats and offer. With restrictions on out-of-centre stores growing, and changing socio-economic trends, several large operators have returned to the high street with small convenience stores. Operators are also seeking to extend their comparison goods offer, turning stores into variety or mini department stores. This trend in out-of-

centre locations could pose a threat to smaller centres, where the large out-of-centre stores become one stop shopping destinations negating trips to the town centres.

- 3.25 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 they have suffered. The focus on urban renewal has increased demand for town centre sites for a wider range of land uses.
- 3.26 Since the mid-90s, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. Mixed-use retail and leisure development has proved to be a real growth area in town centres. These trends present significant opportunities and challenges to Salisbury's centres and in particular Salisbury. The centre is well placed to benefit from forecast spending growth but it needs to adapt if it is to capitalise on these opportunities, and maintain and enhance its position within the wider region.
- 3.27 In the commercial leisure sector, changing social and demographic trends and increased personal disposable income will fuel sustained growth in mainstream commercial leisure activities, including cinemas, bars, restaurants and post deregulation, significant additional investment in the gambling and entertainment industry. As a consequence of market trends and policy, many main stream leisure activities, including the cinema, are increasingly returning to traditional town centre locations.

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## 4. SUB-REGIONAL CONTEXT

- 4.1 This section examines the relationship of the centres in Salisbury with the wider sub-region, and in particular the influence of key competing strategic centres on the current and future role of Salisbury's centres. It draws extensively on the household telephone survey data which underpins the whole study. Our detailed analysis of each centre and comparison between them is set out in Appendix 1a to 1d and the key conclusions and themes are drawn out in this section.
- 4.2 We have drawn on a number of data sources, including the Household Telephone Survey, PROMIS, Javelin Venuescore Ranking, Focus Property Intelligence database and EGi, and have had discussions with each of the local authorities to clarify the position regarding development in the pipeline. Our assessment of each of the competing centres identifies the main retail offer and the extent to which this is likely to change and influence shopping patterns in the Salisbury District in the future.
- 4.3 The Household Telephone Survey highlights the key centres competing with Salisbury and to a lesser extent Amesbury (Plan 2). These include Southampton, Bath, Trowbridge, Swindon, Yeovil, Andover, Poole and Bournemouth, and have the greatest influence on shopping patterns in the Salisbury catchment area. The location of these centres in relation to Salisbury is illustrated on Plan 1.
- 4.4 Shopping patterns derived from the Household Telephone Survey enable us to calculate the amount of comparison goods expenditure that each competing centre draws from the defined Salisbury survey area. As well as strength of retail offer, this indicator takes into consideration accessibility and distance from the Salisbury catchment area. The amount of expenditure leaking to these centres is highlighted in Table 4.1, and illustrated on Plan 3. We have identified the influence of competing strategic centres, based on this survey data, throughout the remainder of this section. The trade leakage to all the identified competing centres is illustrated on Plans 3 to 12.

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

| Centre      | Comparison Goods Trade Draw from Catchment Area (£000) | % of Total Available Comparison Goods Expenditure (%) |
|-------------|--|---|
| Salisbury   | 238,642  | 14.6  |
| Trowbridge  | 158,401  | 9.7   |
| Andover     | 146,564  | 9.0   |
| Southampton | 140,573  | 8.6   |
| Bournemouth | 81,427   | 5.0   |
| Poole       | 72,047   | 4.4   |
| Bath        | 52,854   | 3.2   |
| Yeovil      | 51,708   | 3.2   |
| Swindon     | 36,440   | 2.2   |

Source: GVA Household Telephone Survey 2006

- 4.5 Salisbury draws the highest proportion of trade (14.6%) from the study area, totalling £238.6m. Trowbridge, Andover and Southampton also attract a high proportion of comparison trade from the study area with respective trade draws of £158.4m, £146.6m and £140.6m. Trowbridge and Andover are smaller than other competing centres but fall within the survey area and consequently a greater proportion of their catchment areas are covered. We consider Southampton to be the greatest threat, given the scale and choice of retail offer and distance from Salisbury's catchment area.
- 4.6 Collectively, the key centres highlighted above draw 59.9% of total available comparison goods expenditure from within the Salisbury survey area. The remaining 40.1% is generally directed towards smaller local shopping facilities, other town and city centres such as Warminster, Bristol and Basingstoke and other retail warehouse provision both within the study area and beyond. Each of these competing centres identified should be viewed as potential threats to the performance of Salisbury over the forthcoming LDF period, and we view the extent of this threat below.

## Profile of Competing Centres

- 4.7 The vitality rank position of each of the competing centres has been derived from Javelin (Venue Score). It is evident from Appendix 1c that Southampton and Bath have the highest rank position reflecting their strength as shopping destinations, but as we have seen above, Southampton is the greater threat given its proximity to Salisbury. Salisbury comes third in the rank positions with a rank position of 41, ahead of Swindon and Bournemouth which have respective rank positions of 49 and 81. Salisbury's rank position reflects its role as a dominant sub regional centre in the hierarchy.

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- 4.8 In terms of retail floorspace, Southampton and Bath are the most dominant in this category with respective retail floorspace figures of 202,000 and 115,000 sq m gross (Table 4.2, Appendix 1c). In contrast, Salisbury has a retail floorspace figure of 85,000 sq m gross, which is also less than Swindon and Bournemouth. Prime retail rents for Salisbury are also lower than Southampton, Bath, Bournemouth and Swindon (Table 4.6, Appendix 1c). They are, however, higher than Yeovil, Andover and Trowbridge.
- 4.9 The strength of Southampton and Bath is also demonstrated by the level of retail demand for each centre. For instance in 2006, Bath had 169 requirements for space and Southampton had 147. Bournemouth is also dominant in this category with 141 requirements. In contrast, Salisbury had 86 requirements, which is higher than Poole, Yeovil, Andover and Trowbridge but the same as Swindon.
- 4.10 The analysis above has reviewed Salisbury's current position within the sub-regional town centre hierarchy. We have taken this a stage further and also reviewed developments in the pipeline in competing centres that present a threat to Salisbury in terms of an enhanced retail offer and a consequent increase in trade leakage. Full details of schemes in the pipeline are set out in Appendix 1d.
- 4.11 It is clear that Bath is expected to reinforce its position in the retail hierarchy with the redevelopment of the Southgate Shopping Centre in the heart of the centre to include approximately 20,000 sq m net of retail floorspace. This has been granted permission and construction is scheduled to begin in 2006. This could attract more people to Bath in Salisbury's catchment area, particularly in Zones 4 and 5, during the LDF period.
- 4.12 The shopping function and offer in Southampton will also be further enhanced if the extension westwards to the city centre take place. We also understand that Southampton city council have also identified a number of smaller sites within the city centre which are considered appropriate for regeneration and retail-led development. Such developments could attract people from Salisbury's catchment to Southampton, particularly from Zone 8.
- 4.13 Trowbridge will also benefit from a mixed use leisure scheme, anchored by a multiplex cinema, on the riverside if planning permission is granted. Outline planning permission has also been granted to extend the Brunel Shopping Centre in Swindon which would result in a net gain of 32,000 sq m floorspace including both leisure and retail floorspace. The redevelopment and extension of this shopping centre could attract more people to Swindon from Salisbury's catchment area particularly from Zone 6 and possibly Zone 5.

## Summary

- 4.14 In terms of the sub-regional context, the Household Telephone Survey has identified Southampton, Bath, Trowbridge, Swindon, Yeovil, Andover, Poole and Bournemouth as the key competing centres. It is clear that Southampton is the greatest threat given its trade draw, scale and quality of retail offer,

rents, proximity, rank position and major development opportunities coming forward over the forthcoming LDF period. Southampton, Bath and Bournemouth are stronger than Salisbury in terms of retail space, Prime Zone A Retail Rents and retailer demand for space, although trade draw to Bath and Bournemouth is more limited given their distance from Salisbury.

- 4.15 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. Salisbury is not, however, far behind the stronger centres, and Javelin actually ranks Salisbury marginally higher than Swindon and Bournemouth based on mix of retailer.
- 4.16 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. Shoppers and visitors come to Salisbury for a variety of reasons, not just shopping which other competing centres rely upon. Salisbury should retain its recognised identity.

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## 5. SALISBURY CITY CENTRE: HEALTH CHECK

- 5.1 Salisbury city centre is the principal shopping area within the predominantly rural District. It is an attractive and historic city, with a high quality environment, and a strong representation of small, specialist shops. Retail expenditure in the city is consequently enhanced by tourists and visitors, with at least 3.3 million tourism visits per annum in recent years (Source: [www.visitsalisbury.com](http://www.visitsalisbury.com)). The city also plays a key role as the economic, social and leisure focus of the District, being its main employment centre and providing health facilities for the District and beyond.
- 5.2 The composition of the primary shopping area is complex and extensive, and falls entirely within a conservation area designation. Defined in detail on the proposals map, the primary shopping frontage incorporates units on Queen Street, Catherine Street, Ox Row, Butcher Row, Blue Boar Row, Silver Street, High Street, Minster Street, New Canal, and the Old George Mall shopping centre. A number of these are narrow, historic cobbled streets, and retail units are generally small. Key anchor retailers throughout the primary shopping area include Bhs, Debenhams, Marks & Spencer and Woolworths. In 1987, Marks and Spencer had a two storey extension to the store at the rear of New Canal Street (Ref:87/1041).
- 5.3 The city centre has three managed shopping centres. The largest, Old George Mall, opened in 1965 and was refurbished in 1997. It has a gross retail floorspace of circa 15,800 sq m, and has over 50 high street names including Marks & Spencer, Bhs, WH Smith, Next, River Island, Virgin Megastore, Superdrug and New Look. The Maltings Shopping Centre opened in 1986, was refurbished in 1999 and has a retail floorspace of 8,175 sq m gross. It is anchored by J Sainsbury, Superdrug and Robert Dyas, and forms a small open air precinct on the river. Cross Keys Mall is an enclosed shopping centre with a relatively modern interior. It has a floorspace of circa 4,650 sq m gross and is anchored by TK Maxx and MVC Recordings.
- 5.4 Salisbury city centre also has a number of higher order and specialist retailers. These include White Stuff, Fat Face, East ladies fashion and Russell & Bromley shoe shop. Other mainstream retailers located outside the shopping centres include Country Casuals, Laura Ashley, Cargo Homestores, Boot the Chemist, Waterstones, Ottakars, and the Early Learning Centre. However, a number of higher order and mainstream retailers found in larger regional centres are not represented, such as, Zara, Hennes, Top Shop, Jigsaw, Esprit, Nine West, Mango, Muji, Oasis, French Connection, Karen Millen, Reiss, Diesel, Whistles and Dorothy Perkins.
- 5.5 Fisherton Street, in the western part of the centre, provides a more specialist shopping area. Independent retailers are dominant along this road with units selling books, antiques and specialist items.

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- 5.6 Key foodstore retailers include a large format J Sainsbury in the Maltings, and a Tesco Metro supermarket on Castle Street. Our detailed qualitative review of these foodstores is attached in Appendix 5. Overall, the J Sainsbury appeared relatively quiet and the Tesco Metro, which is more likely to cater for top-up and lunch time shopping trips, was busy on the day of the site visit. It is likely that the Sainsbury's would be busier during the evening and at weekends when shoppers are undertaking their main food bulky shopping trips. Outline planning permission was granted for the Sainsbury's store in 1984 (Ref:84/213) there were no conditions attached restricting servicing hours, opening hours or the sale of goods. The Tesco store was granted permission in 1974 (Ref:74/0657), with no restrictive conditions attached.
- 5.7 Our detailed qualitative analysis of Salisbury, attached in Appendix 2, indicates that the centre is healthy and performing well in a number of health check indicators. The number of comparison retailers, and proportion of floorspace occupied by comparison goods retailers, is above the national average. There is a stronger representation of ladies and children's retailers, and the number of menswear retailers is below the national average. The number of vacant units and proportion of vacant floorspace is below the national average, and there are no concentrations, or problem areas, identified through our investigations.
- 5.8 Major foodstore provision, comprising J Sainsbury and Tesco Metro, is good, although the number of convenience units and proportion of floorspace is below the national average. This suggests that the representation of smaller independent convenience goods retailers is limited. Prime Zone A retail rents have risen by 20% since 2001, and commercial yields have remained steady in recent years, reflecting consistent investor confidence. The number of registered requirements from retailers to locate in the city has risen from 41 to 86 between 2001 and 2006. This equates to a rise in rank position of 80 places to a national position of 61.
- 5.9 In terms of major commercial leisure facilities, Salisbury has a five screen Odeon cinema, the Chapel night-club, a Gala Bingo hall, the Playhouse Theatre, and an LA Fitness health and fitness club. There is a good selection of traditional public houses and chain bars throughout the city centre, although the selection of quality wine-bars, pubs/bars and restaurants is relatively limited for a centre of this size and position in the retail hierarchy. Chicago Rock Café, the Hogshead and the Kings Head on Bridge Street are larger format pub destinations, but these reflect the lack of quality evening destinations for a wider cross section of the catchment population.
- 5.10 The quality of the environment is good. The mix of historic buildings and cobbled streets sits well with more modern development, and shop fascias are maintained to a high standard. There is evidence of significant investment in the environment throughout the city centre in the form of hanging baskets and street box planters; and The Gardens, adjacent to the Maltings are an attractive and well maintained area of soft landscaping. Paving is good throughout the city centre and lighting and CCTV is present throughout the shopping area. Litter and graffiti do not appear to be a cause for concern.
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- 5.11 According to data recorded by City Centre Management, footfall for the city was up each month in 2005 except November, in sharp contrast to 2004 where there were increases in only 8 months, and only 5 in 2003. There has been very little change in the popularity of shopping areas. High Street North, Silver Street, The Maltings and High Street South continue to experience the highest levels of footfall. The most improved area for footfall is Butcher Row, perhaps as a consequence of new cafes opening. The stability in pedestrian flows reflects little or no change in the structure of the built environment or retail and leisure representation.
- 5.12 City Centre Management have undertaken analysis of crime statistics through a partnership with the police. Between April 2004 and January 2006 overall crime rates fell slightly and detection rates increased from 44% to 51%. Violent crime, theft and handling and drugs has increased, although this is accounted for by new police initiatives and a growth in detection rates. Burglary, vehicle crime and criminal damage has decreased.
- 5.13 Customer views and behaviour have been analysed through the Household Telephone Survey and In-Centre Survey undertaken as part of the Retail and Leisure Needs Assessment (Appendix 8 and 9). According to the telephone survey, those who visit Salisbury for their non-food shopping like the city centre because it has an attractive environment (33%), it has a good range of chain/well known stores (27%), it is close to home (22%), it has a good range of independent stores (20%), it has good and/or free parking (9%), and it is part of an overall day out (9%). We consider this forms positive feedback on the retail offer and the overall city as a visitor destination.
- 5.14 In terms of dislikes, respondents to the telephone survey, who visit Salisbury for their non-food shopping, stated it was difficult to park (15%), they disliked levels of traffic congestion (12%), there is a lack of non-food stores (6%), the cost of car parking is too high (5%) and the shopping area is too spread out (4%). Of those who visit Salisbury for their non-food shopping, 48% disliked nothing/very little, reflecting its popularity as a shopping destination. Parking difficulties may be addressed through the recently introduced Park & Ride system.
- 5.15 The in-centre survey respondents comprised local shoppers (70%), day trippers/visitors (21%), and tourists on holiday (9%). When asked what the main purpose of their trip was, 38% stated non-food shopping, 12% were undertaking food shopping, 9% were working or on business, 9% were browsing, 8% were sightseeing, 6% were visiting hair dressers/beauty salons, 6% were socialising, and 3% were visiting financial services. Their figures reflect the range of retail, service and visitor attractions available in Salisbury city centre.
- 5.16 Those who were in Salisbury city centre for their non-food shopping were asked if it was their usual first choice destination for clothing, footwear and other non-food shopping. 71% stated that it was their first choice destination, but 25% said it was not, and noted that they usually visit Southampton (25%), Andover (16%), Bath (16%) and Portsmouth (10%). These figures demonstrate that Salisbury has more to offer than a number of higher order and competing centres in the sub-region, for example, the historic and attractive environment and good range of specialist retailers. A number
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of shoppers have evidently felt like a change from their first choice destination, and chosen Salisbury as an alternative.

- 5.17 In terms of transport/accessibility, 59% travelled by car, 20% walked, 15% travelled by bus, and 2.5% travelled by train. Respondents were asked how long their journey took, and almost 50% travelled for between 6-20 minutes, and a further 20% travelled for between 21-30 minutes. Park & Ride usage appears low, although the system has been recently introduced and we envisage numbers to rise. At present, these figures reflect the importance of car parking in the city centre, although this will need to be monitored in accordance with Park & Ride usage.
- 5.18 Respondents were asked how often they visited Salisbury city centre for a number of different reasons. The results reflect high frequency trips for shopping and food/drink outlets, although results were lower for services and leisure facilities. The local catchment are likely to use smaller and more local centres for their personal and financial service requirements. In terms of leisure facilities, 41% never visit Salisbury city centre, 11% visit once a month, 10% visit once every 1-6 months and only 12% visit once a week. These figures reflect the weak role of evening leisure provision compared to the daytime visitor and shopping role.
- 5.19 Overall, the health check of Salisbury city centre reflects a vital and viable city centre performing well within its current role. 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.
- 5.20 The street pattern in the city centre is complex and extensive, which is both a strength and weakness given the history attached to the built environment. It does mean, however, that pedestrian circulation, particularly for less frequent visitors and tourists, may not reach all quarters of the city. There has been evident investment in signage throughout the city centre, but the fragmented nature of shopping streets makes it difficult for pedestrians to navigate around the primary shopping area, and they are unlikely to find or visit all parts in one visit.
- 5.21 Our analysis has highlighted a relatively good representation of anchor retailers and mainstream and specialist retailers – registered as a strength by respondents in the in-centre survey results. It is also evident, however, that a number of key attractors are missing from the mix of retailers in the city centre, in particular good quality units for department store operators, and higher order and mainstream retailers. Although there is a good representation of comparison goods retailers, i.e. above the national average, the proportion of units occupied by menswear retailers is below the national average.
- 5.22 It is clear that the number of retailers with registered requirements for space in the city has grown in recent years, although the quality of operator is not at present sufficient to fill the gaps in the higher order and mainstream sector of the market. It is this sector that Salisbury should strengthen over the forthcoming LDF period in order to compete effectively with growing centres in the wider sub-region. It should be noted that new developments coming forward do generate interest from a wider range

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and quality of retailer, and this is not the case in Salisbury at present. It is likely, given the evident popularity of the centre at present, that new development could generate interest from higher order quality retailers to help 'plug the gap' and strengthen Salisbury's sub-regional role.

- 5.23 We have already pointed out that the number of vacant units and proportion of vacant floorspace is below the national average, which is generally a good indication of the vitality and viability of a town/city centre. This is certainly the case in Salisbury. However, in Salisbury it also reinforces the lack of space available to offer to new retailers not currently represented in the city centre, who will instead turn to new developments in competing town centres in the wider sub-region. This lack of space is a barrier to growth in Salisbury city centre, most notably in the mainstream and higher order clothing and footwear categories.
- 5.24 As schemes come forward in competing centres the retail attraction will improve and erode Salisbury's market share, particularly in the mainstream clothing and footwear sector. It is already clear from the results of the in-centre survey that Salisbury is not the first choice shopping destination for a number of visitors, who instead choose to visit Southampton, Andover and Bath, for example.
- 5.25 It is clear from our analysis that Salisbury is not fulfilling a strong evening economy/leisure role. In the Household Telephone survey 66% of respondents never visit Salisbury in the evening, and in Zone 1, the Zone in which Salisbury is located, 29% never visit Salisbury in the evening, and in Zone 2, 46% had the same response.
- 5.26 When asked which town centre do you visit more often for pubs/night-clubs, less than 10% stated Salisbury city centre, although the response rate in Zone 1 and 2 was higher (63% and 21% respectively). For restaurants, 15% of respondents visit Salisbury, but again the response rate is higher in the central zones (Zone 1: 76% / Zone 2: 42%). It is clear, however, that Salisbury is not a first choice evening economy destination for a large proportion of the catchment population.

## Summary

- 5.27 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.
- 5.28 Our analysis identifies a vital and viable town centre. The number of comparison outlets is above the national average, the proportion of vacant units is well below the national average, rents have risen in recent years, yields have remained static and demand from retailers for space has increased. The city centre has a good mix of leisure activities including a cinema, night-club, bingo hall, health & fitness club and a theatre. Pedestrian footfall has increased across the centre and overall crime figures have fallen. Shoppers particularly like the environment, the range of well-known/multiple retailers and good selection of independent and specialist stores.

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- 5.29 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 proportion of menswear units is below the national average.
- 5.30 Retailer demand has risen, but the quality of requirements is not sufficient to fill the gaps in provision. Developments in the pipeline will, however, stimulate demand, and we consider Salisbury would be a destination of choice for a number of retailers if the opportunity arose. Vacancy rates are below the national average, but this represents a barrier to growth, i.e. there is no space for new retailers to enhance provision. At present, Salisbury is not a first choice shopping destination for a number of shoppers who instead choose to visit competing centres such as Southampton. Without new development in Salisbury, this position will only be exacerbated over the LDF period, as competing centres continue to improve and implement proposals in the pipeline. Our analysis has also identified a weak usage of the centre in the evenings.

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## 6. LOCAL CENTRES: HEALTH CHECKS

- 6.1 In this section, we provide a qualitative assessment of the smaller centres in the district, drawing on Appendix 3, 4 and 5.

### Amesbury

- 6.2 Amesbury is the second largest settlement in the District was considered to have potential for significant economic growth during the last Plan period. It is apparent from our site visit that a number of changes have taken place in recent years and months.
- 6.3 The comprehensive redevelopment of the Redworth House site in Amesbury town centre was allocated for a new foodstore in the adopted Local Plan (2003). This is now under construction and Co-Op will move from their existing store on Salisbury Street in the next few months. The site's access onto Salisbury Street lies within the Primary Shopping Frontage, adjoins the Conservation Area and lies within an Area of Special Archaeological Significance.
- 6.4 The planning application (Ref.: S/2001/2177) sought permission for the construction of a 1,951 sq m gross, 1,395 sq retail floorspace supermarket together with the provision of a 136 space car park including 10 disabled parking spaces. The existing One Stop Shop facility at Redworth House will be demolished to provide the necessary car parking facilities as a part of the permission. Co-op confirmed through its retail statement that the required One Stop Shop facilities will be relocated to the existing store and still provide some 460 – 530 sq m net retail floorspace to enhance the retail offer in Amesbury further. Condition 25 deals with this issue:

*"Prior to the commencement of development a scheme for the refurbishment, including floor layout and marketing for the retail element shall be submitted to and approved in writing by the Local Planning Authority, and the re-use of the existing premises and the appropriate marketing shall accord with the approved scheme or any subsequent revision approved by the Local Planning Authority.*

*Reason: to ensure that adequate accommodation is retained for both One Stop Shop and retailing facilities given the strategic importance of both elements to Amesbury's role as an important local centre."*

- 6.5 Elsewhere in the town centre, a new mixed use residential and retail development has recently been completed on the junction of High Street and London Street. The attractive development is well designed and adds to the overall built environment in Amesbury, although footfall in this part of town is low at present. When the development has been fully let and settles into trading patterns, we would expect footfall to increase, provided the retailers are of a quality to attract shoppers.

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- 6.6 Our qualitative assessment of Amesbury identified a relatively healthy centre (Appendix 3). There are no managed shopping centres, and the centre has a total retail floorspace of circa 10,126 sq m gross split into 71 shop units. The shopping centre is anchored by the Pioneer supermarket, and other key retail attractors include the One Stop convenience store, Moss Pharmacy, Thresher Wine Shop, Barclays Bank, Lloyds Bank and Logan Homecare DIY. The Amesbury country market also takes place on the first Saturday of the month in the Methodist Church Hall. Leisure provision is limited as you would expect for a centre of this size, although there is a small selection of public houses.
- 6.7 The retail composition in Amesbury is consistent with our expectations of a centre performing a more local shopping function. In particular, the number of convenience goods units and service businesses is above the national average, and the number of comparison goods units is below the national average. It is also clear that the number of vacant units and proportion of vacant floorspace is considerably below the national average, reflecting the health of the centre.
- 6.8 The environmental quality in Amesbury is generally good. There are a number of attractive and historic buildings, there has been evident investment in hanging baskets and tree planters, street paving is generally well maintained and there are no signs of graffiti or litter throughout the centre. There is perhaps some scope to invest in shop fascias and there are few seating areas. There are more purpose built modern units in Amesbury compared to the smaller village centres in the District. The shopping centre appeared busy and popular on the day of the site visit.
- 6.9 We understand that the County Council has plans to widen the pavements on Salisbury Street in Amesbury town centre, and to remove about one third of the car parking spaces. This is scheduled to take place in about three years, and should significantly improve the pedestrian environment and pedestrian circulation around the centre.
- 6.10 Amesbury offers on-street parking throughout the centre, free for up to 1 hour between 8am and 8pm. On the day of the site visit on-street parking was at full capacity. There is also a car park behind the existing Co-Op and the bus station is located on the junction of Salisbury Street and Salisbury Road. This provides services throughout the district and offers easy pedestrian access to shop frontages in the town centre.
- 6.11 Within the results of the household telephone survey, 10% of respondents stated that they visit Amesbury for their non-food shopping, and of those respondents, 17% visit once a month, 17% visit 3-4 times a year, 16% visit once a week, and 11% visit only once a year. When asked what they liked about Amesbury, 26% stated it was close to home.

## Villages

- 6.12 We undertook detailed site visits and health checks of Downton, Mere, Tisbury and Wilton. These centres are smaller in scale with little standard published performance data available. The health checks therefore draw largely on detailed street audits carried out during July 2006. We consider a

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range of indicators including physical characteristics, retail composition, the key retailers, the environment and the centre's accessibility. Detailed street audits and health check indicators are attached in Appendix 4. Overall, we understand there is a general concern relating to all centres in respect of them losing essential services and shopping provision. The aim over the forthcoming LDF period will be to introduce strict frontage policies to protect retail and service units from change of use.

- 6.13 Tisbury has approximately 25 shop units with a good selection of shopping facilities. The centre is anchored by a small Co-Op convenience store, together with a delicatessen, butcher and grocer. There is also a Post Office, pharmacy, hairdressers, and a range of non-food retailers including a shoe shop, ladies clothing, a florist, a DIY store and an electrical store. Tisbury has a Natwest bank, but other financial services are limited. There are cash points at the Co-Op foodstore. There are only three vacant units.
- 6.14 The centre has a particularly rural and quiet feel, with low pedestrian footfall and an attractive and peaceful village setting. The old Brewery in the village has been converted into high quality residential flats and houses. Tisbury has some on-street parking, and from observations on the site visit, this appeared to perform a short stay/quick visit role. Bus services link Tisbury directly with Salisbury, Shaftesbury, Gillingham, and Hindon, although these are relatively infrequent rural services.
- 6.15 Mere is of a similar size to Tisbury, with 26 shop units. Mere has a strong service sector offering a good selection of public houses, estate agents, hairdressers and a Lloyds TSB bank. The centre also has a pharmacy and a Post Office and there is only one vacant unit. In terms of convenience provision, Mere is anchored by a Co-Op foodstore, and there is also a butchers and small Spar shop. The Co-Op has recently been refurbished but is small in scale and performs a top up shopping role. The store is open from 7-1pm everyday. Non-food retailing is particularly limited and comprises a hardware store, antiques shop, charity shop, and a card/stationery store.
- 6.16 Mere is an attractive village, and won the Best Kept Village in 1992, 1997 and 2000. There is some on-street parking providing free spaces Monday-Saturday between 9.30-4pm. Double yellow lines control traffic congestion in the centre in places. A number of bus routes serve the centre, providing access to Shaftesbury, Gillingham, Yeovil, Wincanton and Bourton. There are also a number of South West coaches market day and shoppers buses which depart from outside the pharmacy and provide 2-3 hours shopping time before returning to Mere. Shopping trip centres include Warminster, Trowbridge, Frome and Poole.
- 6.17 In terms of the number of units, Downton is the smallest village in the district, and is in keeping with the excellent environmental quality and English 'village' environment common throughout the district. The village is split into three separate frontages interspersed with cottages and countryside. The highest proportion of units are occupied by service businesses, including three public houses, a bank, a fast food takeaway and a hairdressers. Comparison retailing is limited, comprising a kitchen

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and bedroom shop, pet shop and a second hand/household goods store. The centre has no vacant units.

- 6.18 The village is anchored by a small top-up convenience goods store, located in the middle of the three of the separate frontages. The store, located adjacent to the pub, bank, hairdressers and cake designer, is open from 8am-10pm Monday - Saturday, and 10am-4pm on Sundays. The Post Office, a library, pharmacy, and small village convenience store is located elsewhere in Downton, in a separate retail frontage. There are approximately 17 free car parking spaces in front of the Co-Op foodstore, and a larger car park to the rear with space for approximately 50 vehicles. This appeared quiet on the day of the site visit.
- 6.19 Wilton is the largest village centre in the district, comprising 42 retail units and offering a good mix of comparison and service retailers. The centre has only two vacant units, and the foodstore/convenience offer is limited for a centre of this size. In terms of service uses, Wilton has a pharmacy, a number of banks, hair/health and beauty shops, and a small selection of cafes and fast food takeaways. The centre also has a Post Office, and there are 17 comparison retailers including antique shops, small independent shoe/clothing retailers, florists, a second-hand bookshop and charity shops. Convenience retailers are limited to a small One Stop convenience store, a fruit and vegetable store and a bakery.
- 6.20 Wilton was busy on the day of the site visit, and there were heavy traffic flows on the main road running through the centre of the village. The central market place car park has circa 30-40 spaces and was full on the day of the site visit. It provides free parking for up to two hours, except Thursdays when the square is occupied by the weekly market. South Street car park is the largest in the village providing circa 70 spaces, and was also almost full on the day of the site visit. Despite heavy traffic flows, Wilton has an attractive environment with a number of traditional and historic houses and shop units, with mature trees. A number of bus routes connect Wilton to destinations throughout the district and beyond.
- 6.21 Our assessment suggests that Wilton is a relatively healthy village centre, performing well in the key vitality and viability indicators. It does not, however, reflect trendline information, and we understand from Council sources that a number of shop units have recently been granted planning consent for conversion to residential uses, and the quality and range of goods could perhaps be improved. If this trend continues, the health of the centre will decline and it will not meet the key service and shopping requirements of the local population.

## Summary

- 6.22 Overall, the small centres in the District form attractive and traditional towns and villages, and the quality of the environment is excellent in each.

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- 6.23 Our assessment of Amesbury has identified a relatively healthy town centre, which has experienced substantial investment in recent years. In particular, a replacement Co-Op store is now under construction and an attractive mixed use residential and retail scheme has been completed on the junction of High Street and London Road. The retail composition in the centre 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 monthly market and vacancy rates are significantly below national average levels.
- 6.24 Downton, Mere, Tisbury and Wilton all perform well as local village centres offering no more than essential 'everyday' requirements to a local catchment. Each centre has a Post Office, pharmacy and local top-up foodstore. Vacancy rates are particularly low in every centre. Wilton is the largest and busiest centre offering the greatest range of comparison units. Tisbury and Downton appeared the most rural and quiet villages with little through traffic, and Mere is an attractive and vibrant centre with good pedestrian footfall. Each centre performs a local shopping function, and they do not appear vulnerable in the current circumstances. It is also apparent that growth is also unlikely over the forthcoming LDF period given their current function and built environment.

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## 7. OUT OF CENTRE RETAIL PROVISION

- 7.1 We have undertaken a qualitative review of out-of-centre retail provision to recognise the distribution of retail floorspace currently competing with town centre provision and to inform our assessment of the need for new retail floorspace in the District.

### Convenience

- 7.2 Salisbury has two main out-of-centre foodstores: Tesco on Southampton Road and Waitrose Food and Home on Churchill Way. The large out-of-centre Tesco is located to the south east of Salisbury City Centre and is the largest foodstore in Salisbury, with a floorspace of 4,436 sq m net. 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. Appendix 5 provides a full breakdown of the stores facilities and product range and Plan 13 shows the location of these store in the District.
- 7.3 In April 2006, consent was granted to extend the Tesco foodstore 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)
- 7.4 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.
- 7.5 Salisbury District Council have recently received a further planning application relating to the Tesco store on Southampton Road, seeking an increase in floorspace by 2,590 sq m (Ref: S/2006/1740). The conclusions of this study will inform the recommendations, and the need case is discussed further in Section 8 and 9.
- 7.6 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

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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. In 1998, two appeals against non-determination relating to the non-food units were allowed - these are discussed further below.

- 7.7 The Waitrose store benefits from good access to the main road network being located off Churchill Way to the north of Salisbury's town centre. In granting outline planning consent for the scheme, the Secretary of State accepted that 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 at least some of the central shopping area of Salisbury. Lying circa 750m from the primary shopping area, the Inspector dealing with appeals 97/1738 and 97/1740 (discussed below) agreed with this edge-of-centre description on the basis of linked trip survey evidence, and that the route is well-used and pleasant.
- 7.8 The store opened in the latter part of 1996 and has a convenience retail floorspace of 2,678 sq m net. A large proportion of the store is dedicated to the sale of the Waitrose comparison goods 'home' range, with a range of bath and bed linen, kitchen and diningware, stationery, audio and visual items and toys on offer. The store is modern in appearance and is well maintained on inside and out. It was busy on the day of the site visit and benefits from ample car parking space and a modern format. Full details of the stores additional facilities are provided at Appendix 5.
- 7.9 The trading performance of each out of centre store is discussed further in Section 10.

## Comparison

- 7.10 The main concentration of Retail Warehousing in the District is dispersed along Southampton Road to the south east of Salisbury City Centre. The Dolphin Retail Park is situated on the north side of Southampton Road and has a retail floorspace of 7,731 sq m net. The current occupiers are all bulky good retailers including Homebase, Lifestyle Furnishings, Haskins and Currys. Our site survey identified one vacant unit, a former MFI Homeworks store. The retail park appeared quiet and outdated on the day of the site visit. The site and surrounding area has not benefited from recent investment and there is little cohesion between units.
- 7.11 The Bourne Retail Park is located to the east of The Dolphin Retail Park and adjacent to the Salisbury Business Park. The three retail units are occupied by Halfords, Allied Carpets and PC World. They have a combined retail floorspace of 2,139 sq m net. Topps Tiles is located adjacent to these units.
- 7.12 Close by, a number of freestanding retail warehouse operators front Bourne Way close to the Tesco food superstore. These include Carpetright, Dreams Beds and Tiles R Us. Further provision is also located along Hatches Lane, to the north of Bourne Way, where Wickes, Staples and Turtons and Tappers are all represented.

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- 7.13 On the south side of Southampton Road are two stand alone units, B&Q and Matalan. B&Q occupies a reasonably prominent location and appears to be one of the better performing units in the area. It has a retail floorspace of 3,078 sq m net. Matalan, located to the west of B&Q, occupies a small site with limited car parking.
- 7.14 Additional retail warehouse provision in close proximity to Salisbury City Centre is located on Churchill Way adjacent to the Waitrose Food and Home Store. Here JJB Sports and Comet are located, and there is also a vacant unit formerly occupied by Powerhouse. These units benefit from the passing trade generated by the Waitrose Store. Units 1 and 3 were subject to two appeals against non-determination. The first (Ref: 97/1738) appeal sought to vary Condition 29 of the original outline permission (Ref: 93/1019) to permit the sale of office supplies, including computer accessories and software. The second (Ref: 97/1740) sought to vary the condition to sell sports goods, including clothing and footwear. Both were allowed. The location of this out of centre provision is shown on Plan 14.
- 7.15 Consent was granted for an out of centre bulky goods retail warehousing scheme on London Road (Ref: S/1994/0632) amounting to 90,000 sq ft. This permission is now extant. We understand the applicants are discussing a revised scheme, although no planning application has yet been submitted. Any revised application should meet the full policy tests outlined in PPS6.
- 7.16 In addition to retail warehousing provision, the Out of Centre Wilton Shopping Village is located 3 miles west of Salisbury at the junction of the A36 and A30. It is open Monday to Saturday 9.30am – 5.30pm, and Sunday from 10.30am to 4.30pm. The centre has approximately 13 retailers including the Book Depot, The Edinburgh Woollen Mill, the Golf Company, The Wilton Carpet Factory, and Ponden Mill furnishings. It is apparent from the telephone survey results that this shopping destination is not influential on shopping patterns in the district, although does provide a reasonably good selection of clothing and homeware retailers for 'one off' special occasion trips.

## Summary

- 7.17 Salisbury has two main edge/out-of-town foodstores. The Tesco store is trading well, and is modern in format and appearance. An extension is currently under construction which will broaden the range of non-food goods, although the proportion is conditioned in the consent. A further application (Ref: S/2006/1740) has been submitted to amend the extension floorspace, resulting in a small net decrease in additional sales floorspace. Waitrose 'Home and Food' is also modern in format and appearance and was busy on the day of the site visit. Referred to as edge-of-centre, the store sells a strong range of non-food 'homeware' products.
- 7.18 The main concentration of retail warehousing in the District is dispersed along Southampton Road to the south east of Salisbury City Centre. There is no dominant retail park in Salisbury, and instead retailers are located on freestanding sites or small groupings. A former MFI unit on the Dolphin Retail Park and a unit adjacent to Waitrose are currently vacant. There is one commitment for

additional bulky goods retail warehousing on a site on London Road. The implications of this are discussed further in later sections.

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## 8. CAPACITY PROJECTIONS

- 8.1 In this section we estimate the current performance of the main town centres and out of centre retail provision in the district, as the basis for forecasting the need for further retail floor space to the period 2021, incorporating interim years of 2011 and 2016. The capacity tables accompanying this assessment are attached in appendix 6 and 7.
- 8.2 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 flows of available expenditure to each retail destination. 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 Salisbury district catchment area;
  - Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of shopping patterns, so as to provide estimates on current sales and forecasts of future sales;
  - Compared the total expenditure attracted to each shopping destination with current retail floor space to assess sales densities in each shopping destination.
- 8.3 Building on the base line position, we have explored the capacity for further convenience and comparison retail floorspace within two scenarios. First, we forecast capacity at a global level for the whole of the district; and second we forecast capacity within Salisbury City Centre and Amesbury town centre.

### Data Input

#### i. Survey Area and Household Survey

- 8.4 In order to provide detailed factual information on the shopping patterns in the district, we commissioned a new household interview survey covering 1,000 households. GVA Grimley designed the survey questionnaire in consultation with Council officers, and NEMs - who undertook interviewing and data processing. The survey area is illustrated on Plan 2.
- 8.5 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 food 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

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for by each type. For food we use a 75% / 25% 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.

8.6 The survey also includes 6 questions on specific comparison goods types which coincide 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 expenditure on that goods type. This process will establish the pattern of spending for residents of each zone in terms of the following types of goods: -

- Clothes and shoes;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic electrical appliances;
- TV, Hi Fi, Radio etc; and
- Personal/luxury goods.

## ii. Estimates of Population in the Survey Area

8.7 Population estimates and forecasts for each of the survey zones were prepared from the Experian e-marketer in-house system. This provides estimates of population in 2006, 2011, 2016 and 2021. Experian data is based on trendline projections and the 2001 census for small, localised areas.

8.8 Overall, the population of the survey area is currently 561,987. It is forecast to grow to 580,174 by 2011, 598,867 by 2016, and again to 634,305 by 2021 (Table 1, Appendix 6). Overall, population is forecast to grow by 13% between 2006 and 2021 within the whole survey area.

## iii. Available Expenditure in the Survey Area

8.9 The Experian e-marketer system provides estimates of the capita expenditure for convenience and comparison goods in 2004 prices. We have made deductions for special forms of trading which represents expenditure not available to spend in the shops, i.e. Internet and catalogue shopping. 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.

8.10 In terms of expenditure growth in the district, we have drawn on convenience and comparison goods growth rates provided by Experian Business Strategies. These indicate that more growth will take place on comparison goods as opposed to convenience goods; the scope to purchase more food is more limited than the scope to purchase non-food goods. Experian Business Strategies estimate a convenience goods growth rate of 0.7% per annum and a comparison goods growth rate of 4.3% per annum. We have generated expenditure by Zone to highlight variations across the survey area.

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- 8.11 Table 2, Appendix 6, applies per capita expenditure within each Zone to population forecasts, which indicates that total available convenience goods expenditure within the survey area is currently £891m. This is forecast to grow to £1,115m by 2021, equating to an overall growth of £224.5m between 2006 and 2021 (Table 2, Appendix 6).
- 8.12 In terms of comparison goods, total available comparison goods expenditure within the survey area is currently £1,635m, and is forecast to grow to £3,469m by 2021. This equates to an overall growth of £1,834m between 2006 and 2021 (112%). (Table 2, Appendix 6).

#### iv. Floorspace Data

- 8.13 The comparison and convenience goods floorspace data used in our modelling has been drawn from the Institute of Grocery Distribution (IGD), Salisbury District Council, the Trevor Woods retail warehouse database and Experian Goad. 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 goods. This accords with the expenditure data and the expenditure assumptions used.

### Convenience Goods Capacity Projections

#### i. Salisbury City Centre

- 8.14 Our methodology estimates the trade draw of Salisbury City Centre for convenience goods (Table 4, Appendix 6). This includes an examination of the trade drawn to Sainsbury's, The Maltings; Tesco Metro, Castle Street; Marks & Spencer, New Canal; and the combined draw of other smaller and independent convenience stores, and a total town centre convenience goods trade draw. The trade draw of the convenience stores in Salisbury City Centre is made up of main food and top-up food shopping. "Other" town centre foodstores include all other units in the town centre selling convenience goods, including bakers, butchers and green grocers.
- 8.15 We estimate that the total convenience goods turnover in Salisbury City Centre is currently £43.6m. Based on a total floorspace of circa 6,024 sq m, Salisbury City Centre currently has an average convenience goods sales density of £7,236 per sq m net. This is lower than our estimate of company average sales densities for the principal and local foodstores in the town centre (£9,569 per sq m net).
- 8.16 The assessment indicates that the Sainsbury's store in the Maltings is performing in line with the company averages, but the Tesco Metro and Marks & Spencer foodstores are performing below expected company average levels. We consider that the survey results may have underestimated the turnover of the Tesco Metro foodstore which appeared busy on the day of the site visit and is likely to cater for lunch time "quick stop" shopping trips and tourists and visitors to the town centre.

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## ii. Salisbury Out-of-Centre

8.17 Our analysis of the household telephone survey has identified the trade draw and catchment areas of the principal out of centre foodstores in the district:

- Tesco, Southampton Road
- Waitrose, Churchill Way

### ***Tesco, Southampton Road***

8.18 Tesco's on Southampton Road is the largest foodstore in the district. We estimate that the store currently has a turnover of approximately £62.9m, which equates to 68% of the combined turnover of the out-of-centre food stores. Based on this turnover, and with a net convenience goods sales area of 3,549 sq m, the sales density of the store is approximately £17,710 per sq m net. This sales density is significantly higher than the level based on Tesco's company average sales density (£12,435 per sq m net).

### ***Waitrose, Churchill Way***

8.19 The Waitrose foodstore on Churchill Way is the second largest foodstore in the district. We estimate that the store currently has a turnover of approximately £30m, which equates to 32% of the combined turnover of the out of centre food stores in the district. Based upon the turnover of the store, with a net convenience goods sales area of approximately 2,678 sq m, the sales density of the store is approximately £11,145 per sq m net. This is marginally higher than the level based upon Waitrose' company average sales density (£10,565 per sq m net) and reflects a strong trading pattern in the district.

## iii. Amesbury Town Centre

8.20 Like Salisbury City Centre, we have estimated the trade draw of Amesbury town centre for convenience goods (Table 8, Appendix 6). This includes an examination of the trade drawn to the Co-Op on Salisbury Street and the combined draw of other smaller and independent convenience stores, and a total town centre convenience goods trade draw. The trade draw of the convenience stores in Amesbury town centre is made of main food and top-up food shopping. "Other" town centre food stores include all other units in the town centre selling convenience goods, including bakers, butchers and green grocers.

8.21 We estimate that the total convenience goods turnover of Amesbury town centre is currently £18.2m, approximately 3.3% of total available convenience goods expenditure in the survey area. Based upon a total net sales floorspace of approximately 1,872 sq m, Amesbury currently has an average convenience goods sales density of £9,670 per sq m net. This is significantly higher than our estimate of company average sales densities for the principal and local foodstores in the town centre

(£4,224 per sq m net), which can be wholly attributed to the strong performance of the town centre Co-op food store. Our figures suggest the store has a sales density of £12,819 per sq m net, significantly higher than estimated company averages of £5,239 per sq m net.

## Convenience Goods Global Capacity

- 8.22 When forecasting capacity for new convenience goods floorspace in the district our model has taken into consideration known commitments for new convenience goods floorspace. These are outlined in Table 17, Appendix 6, and include the extension to the Tesco foodstore on Southampton Road. Based on a net convenience goods increase in floorspace of 850 sq m, and a sales density of £12,435 per sq m net, we estimate the extension will generate a turnover of circa £10.6m. A replacement Co-Op foodstore is also under construction in Amesbury town centre. Based on a net increase in floorspace of 372 sq m, and a company averages sales density of £5,239 per sq m net, we estimate the store will have an average turnover of £1.9m.
- 8.23 We consider that there will be surplus expenditure available to support further convenience goods floorspace in the district between 2006 and 2021. Our projections are summarised in Table 18, Appendix 6, which indicates that by 2011 there will be £15m of residual expenditure to support new convenience goods floor space, which is forecast to grow to £26m by 2016, and again to £38m by 2021.
- 8.24 When converting this residual expenditure into floorspace we have incorporated a sales density of £10,000 per sq m net; a minimum level required by most major foodstore operators. On this basis, there is capacity for an additional 1,516 sq m net of convenience goods floorspace by 2011, growing to 2,623 sq m net by 2016, and again to 3,790 sq m net by 2021.

## Convenience Goods Town Centre Capacity

- 8.25 We have reviewed the capacity for additional convenience goods floorspace within the urban area of Salisbury and Amesbury town centres based on current market shares. This analysis is set out in Tables 19 and 20 of Appendix 6 and summarised here in Table 8.1 and 8.2.

**Table 8.1: Residual Convenience goods expenditure by centre (£m)**

|                  | 2011 (£m) | 2016 (£m) | 2021 (£m) |
|------------------|-----------|-----------|-----------|
| <b>Salisbury</b> | 2.6       | 11.8      | 21.5      |
| <b>Amesbury</b>  | -1.3      | -0.3      | 0.8       |

**Table 8.2: Floorspace Capacity**

|                  | 2011 sq. metres net | 2016 sq. metres net | 2021 sq. metres net |
|------------------|---------------------|---------------------|---------------------|
| <b>Salisbury</b> | 262                 | 1,178               | 2,145               |
| <b>Amesbury</b>  | -131                | -29                 | 78                  |

8.26 We consider the Council should be cautious in terms of new major out of centre food store proposals given the impact on existing centres. Any food store proposal in an edge or out of centre location must demonstrate that they meet the following requirements, set out in PPS6:

- The need for development;
- That the development is of an appropriate scale;
- That there are no more central sites for the development;
- That there are no unacceptable impacts on existing centres;
- That locations are accessible.

## Comparison Goods Assessment

### i. Salisbury City Centre

8.27 Table 4, Appendix 7 indicates the trade draw of Salisbury City Centre and Plan 3 illustrates the extent of the town centres influence throughout the defined survey area highlighting variations in market share. It is evident that the influence of Salisbury extends across the full extent of the survey area, and that the area does not capture the full extent of the Salisbury City Centre catchment area.

8.28 Within the whole survey area, Salisbury City Centre draws 15% of total available comparison goods expenditure. On the basis of current market shares, we estimate that Salisbury City Centre draws £238.6m of comparison goods expenditure from within the survey area (Table 5, Appendix 7). 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 Salisbury 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 15. The assessment enabled us to calculate a 15% inflow of comparison goods expenditure from beyond the survey area.

8.29 On the basis of current market shares, and the inflow of expenditure, we estimate that Salisbury City Centre currently has a comparison goods turnover of £280.8m. With an existing shop floorspace of

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approximately 32,188 sq m net, we estimate that the city centre has a sales density of approximately £8,722 per sq m net. Based on our experience elsewhere, and considering the competition in the sub-region, we consider that Salisbury is performing well in this sector. These findings are consistent with our qualitative assessment of the city centre outlined in section 5.

## ii. Amesbury Town Centre

8.30 Table 8, Appendix 7 indicates the trade draw of Amesbury town centre for comparison goods. As you would expect, the comparison goods catchment area of Amesbury town centre is considerably more constrained than Salisbury City Centre. Amesbury has a 1% market share in Zone 1, but a 0% market share elsewhere in the survey area. We do not consider there is any inflow of trade to Amesbury for comparison goods from beyond the survey area boundary.

8.31 Taking the survey area as a whole, and on the basis of current market shares, we estimate that Amesbury town centre has a comparison goods turnover of circa £3.5m (Table 9, Appendix 7). With an existing shop floorspace of 2,418 sq m net, we estimate that Amesbury town centre has a sales density of approximately £1,427 per sq m net. This is a relatively low trading level, but is consistent with our qualitative assessment outlined in Section 6, which identified a healthy centre, but a weak comparison goods shopping element compared to convenience and service provision. The figures reflect the function of the town centre catering principally for local 'everyday' convenience shopping and service requirements.

## iii. Retail Warehousing

8.32 Salisbury has an extensive range of retail warehousing illustrated on Plan 14. 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 such, the results have enabled a review of the B&Q Warehouse on Southampton Road, other retail warehousing on Southampton Road, and retail warehousing on Churchill Way.

8.33 On the basis of current market shares, we estimate that retail warehousing in the district currently has a comparison goods turnover of £128m (Table 7, Appendix 7). Based upon an existing retail floorspace of approximately 29,497 sq m net the results of the telephone survey suggests that collectively the units have a sales density of approximately £4,339 sq m net. Based upon a company average sales density for the retail warehouse units combined £2,246 sq m net our assessment indicates that this area of retail warehousing is performing particularly well. We do however consider that a number of the units, particularly along Southampton Road, are outdated and there is potential for redevelopment/recycling of existing space.

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## Comparison Goods Global Capacity

- 8.34 In assessing capacity for future comparison goods floorspace, 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 2%. Drawing on our experience elsewhere in similar sized and performing centres we have also assumed that new floorspace should achieve sales of least £5,500 per sq m net in 2006, also growing by 2% per annum.
- 8.35 This assessment has considered the effect of Salisbury district maintaining its existing market share and used growth in available expenditure to support the development of new floorspace. In the latter part of the LDF, Salisbury could face increasing competition from centres in the wider sub-region if new town centre schemes go ahead. Maintaining existing market share will become increasingly important in retaining the city centre's higher order role as envisaged in the RSS.
- 8.36 When forecasting capacity for new comparison goods floorspace in the district our model has taken into consideration known commitments for new comparison goods floorspace. There is one known commitment, which is outlined in Table 14, Appendix 7. Planning consent has been granted for a 8,361 sq m gross (90,000 sq ft gross) bulky goods retail warehouse scheme on London Road at the roundabout junction with Pearce Way. Based on a net comparison goods floorspace of 6,689 sq m, and a sales density of circa £2,000 per sq m net, we estimate the extension will generate a turnover of circa £14.8m by 2011.
- 8.37 Based upon this assessment, it is evident from Table 15, Appendix 7, that there will be capacity to support further comparison goods floorspace in the district by virtue of growth in population and available expenditure. We estimate that by 2011, based on current market shares, there would be theoretical capacity to support an additional 9,181 sq m net of comparison goods floorspace, increasing to 22,488 sq m net by 2016, and 38,115 sq m net by 2021.
- 8.38 In order to translate these projections into gross town centre floorspace requirements, it is necessary to incorporate a net:gross ratio. Conventionally, a figure of 65% has been assumed, although improved design may enable higher net:gross ratios to be achieved. It would also be reasonable to apply an additional 15% of floorspace (of the total scheme) for A2/A3 uses. In this scenario, the net capacity figures equate to a gross capacity figure of 16,617 sq m by 2011, 40,702 sq m by 2016, and 68,986 sq m by 2021. These figures do not include leisure floorspace, which has become a common feature of current town centre development proposals in the UK.
- 8.39 It should be noted that any capacity generated in out-of-centre locations does not justify the development of further out-of-centre comparison goods floorspace in the district. In line with Government policy it will be necessary to direct global capacity into the town centres in the first instance.

## Leisure Goods Expenditure Projections

- 8.40 The Experian E-marketer Report calculates annual consumer leisure expenditure per person on leisure and recreation goods and services (2004 price base), based upon the demographic profile of the catchment area. Leisure expenditure as defined by Experian includes recreation and sporting services, cultural services, games of chance and bars/restaurants.
- 8.41 We have projected available expenditure per capita up to 2021, based on the population projections from the study area, and assume an ultra long term growth rate in available expenditure of 2% per annum for leisure goods. This ultra long term growth rate figure is derived from Experian Business Solutions.

**Table 8.3 : Per Capita Leisure Goods Expenditure Adjustments – Total study area**

| 2006 (£) | 2011 (£) | 2016 (£) | 2021 (£) |
|----------|----------|----------|----------|
| 1,592    | 1,757    | 1,940    | 2,142    |

Source: Experian Business Solutions, Emarketer, 2006

- 8.42 The annual consumer expenditure per person on leisure goods, in the catchment is currently £1,592 (2004 prices) based on an average across the study area. Per capita expenditure on these goods will grow to £2,142 by 2021 (Table 8.3). At present (2006) per capita spending on leisure goods in the study area is approximately 7% below the national average.
- 8.43 If we apply the per capita goods expenditure to the total population of the catchment area it highlights that there is currently over £894.6 million of available leisure expenditure in the catchment area. This is expected to rise to just over £1,359 million by 2021 (Table 8.4).

**Table 8.4: Total Leisure Expenditure catchment area**

|                 | 2004 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) |
|-----------------|-------------|-------------|-------------|-------------|
| Total Catchment | 894,590     | 1,019,650   | 1,162,050   | 1,358,920   |

Source: Experian Business Solutions, Emarketer, 2006

- 8.44 The demand for additional quality leisure facilities will naturally grow as the population increases, and within the catchment area the current network of centres, for example Salisbury, should remain the main policy focus for leisure growth.

## Restaurant/Café Expenditure

- 8.45 According to Experian Business Solutions (2004), the average person, in the catchment area, spends £926 per annum in restaurants/cafes. Experian also estimate that people's average likely spend on leisure goods such as eating out increases by 2% each annum. Currently the total spend available for restaurant/cafés in the study area is £520.4m, increasing to £790.5m in 2021, as identified in Table 8.5.

- 8.46 This does not justify a more flexible policy approach in Primary Shopping Frontages, and A1 shop uses should continue to be protected to underpin the vitality and viability of the town centres. It may be appropriate to allow a more flexible policy approach elsewhere in the Primary Shopping Areas and town centre boundaries, enabling the representation of A3 and A4 uses which can enhance the vitality and viability of a centre and encourage longer trip times. The tighter control of A5 (hot food take-away) uses may be appropriate. On this basis, our assessment highlights sufficient growth in the study area to sustain a circa 52% growth in this sector by 2021.

**Table 8.5: Restaurant / Café Expenditure Forecasts – Total Study Area**

| Projection       | 2006 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) |
|------------------|-------------|-------------|-------------|-------------|
| Total Study Area | 520,375     | 593,129     | 675,962     | 790,480     |

Source: Experian Business Solutions, Emarketer, 2004

## Leisure Floorspace Capacity

- 8.47 Given best practice towards vital and viable town centres, and the growing trend towards mixed use town centre schemes discussed in Section 3, it is usual to assume that town centre comparison goods retail schemes will comprise circa 15% of leisure floorspace. On this basis, Table 8.6 indicates the potential capacity for additional leisure floorspace (Use Class A3/A4/A5) in the District over the forthcoming LDF period. The calculation is based on the capacity for additional comparison goods floorspace in the District in the baseline position.

**Table 8.6: Leisure Floorspace Capacity (sq m net)**

| Area   | 2011 (Sq m net) | 2016 (Sq m net) | 2021 (Sq m net) |
|--|-----------------|-----------------|-----------------|
| Capacity for Comparison Goods Floorspace in the District   | 9,181           | 22,488          | 38,115          |
| Capacity for A3/A4 Leisure Floorspace in the District Based on 15% additional to Comparison Goods Capacity | 1,620           | 3,968           | 6,726           |

- 8.48 Clearly the profile of the catchment population, in terms of socio-demographic composition, will determine the location, scale and quality of restaurants/cafés in the catchment area. There is strong growth in overall leisure expenditure, and the capacity for town centre schemes supports the argument for more leisure floorspace to meet the need resulting from a growth in expenditure over the LDF period. These figures outlined in Table 8.6 do not include commercial leisure facilities such as cinemas, and only indicate capacity for restaurants, bars and cafes and other similar leisure uses falling within Use Class A3/A4 and A5. The range of Use Class A can be restricted through conditions.

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- 8.49 Salisbury has a 5 screen cinema, which is relatively small compared to 10-12 screen cinemas required in new developments. It is evident from the results of the household telephone survey that a number of people from the central zones are travelling elsewhere to competing cinema provision. For example, 9% from Zone 2 are travelling to Basingstoke; 32% from Zone 3 are travelling to Yeovil; 65% from Zone 7 are travelling to Basingstoke; 23% from Zone 8 are travelling to Southampton and 37% from Zone 9 are travelling to Poole.
- 8.50 On this basis we consider that the District could support additional cinema screens, perhaps through new development or an extension to the existing Odeon – subject to the constraints of the built environment. In accordance with PPS6, any proposals for leisure development should comply with the sequential test and other key requirements.

### Office Floorspace Capacity

- 8.51 The office market in Salisbury is made up of a number of small suites usually located above retail, and a small number of larger buildings for the main employers such as Friends Provident in Castle Street. Salisbury is not a major office centre and this is characterised by the lack of purpose built offices, and little published information available on UK property data sets.
- 8.52 In terms of new office provision in Salisbury we understand that there is a proposal for a Bioscience and Technology Centre (PBTC) which lies to the east of Porton Village to the north east of Salisbury City Centre. A Master Plan has been prepared for the entire Porton Down land comprising approximately 10ha of land. The main objective for the site, over the next 10 years, is to become one of the foremost research and science locations in the country, with the potential to attract related companies and bodies to other sites in the vicinity.
- 8.53 Overall, we consider that Salisbury has a weak office market compared with the neighbouring centres of Southampton and Bath. We do however envisage that the development of Porton Down, if approved, will help to attract more businesses to the Salisbury area over the course of the LDF period.

### Summary

- 8.54 Our capacity projections indicate that the total population of the survey area is forecast to grow from 561,987 in 2006 to 634,305 in 2021 - a strong increase of 13%. Convenience goods expenditure is expected to increase from £890.7m in 2006 to £1,115m by 2021. In the comparison sector, higher growth rates illustrate that spending will increase from £1,635m in 2006 to £3,469m in 2021 - an overall increase of £1,834m (or 112%).
- 8.55 Our analysis has indicated residual capacity to support additional retail floorspace over the forthcoming LDF period. These baseline capacity figures are illustrated in Tables 8.7, 8.8, 8.9 and 8.10 for convenience and comparison goods. They highlighted capacity to supposed additional

floorspace based on current market shares, and have taken into consideration commitments. If new development proposals come forward above these levels, the issue of claw back (i.e. increasing market share) would need to be taken into consideration.

**Table 8.7: Convenience Goods Baseline Capacity Projections (£000)**

| Area                  | 2011 (£000) | 2016 (£000) | 2021 (£000) |
|-----------------------|-------------|-------------|-------------|
| Total District        | 15,165      | 26,229      | 37,901      |
| Salisbury City Centre | 2,616       | 11,780      | 21,449      |
| Amesbury Town Centre  | -1,307      | -295        | 781         |

**Table 8.8: Convenience Goods Baseline Capacity Projections (sq m net)**

| Area                  | 2011 (Sq m net) | 2016 (Sq m net) | 2021 (Sq m net) |
|-----------------------|-----------------|-----------------|-----------------|
| Total District        | 1,516           | 2,623           | 3,790           |
| Salisbury City Centre | 262             | 1,178           | 2,145           |
| Amesbury Town Centre  | -131            | -29             | 78              |

**Table 8.9: Comparison Goods Baseline Capacity Projections (£000)**

| Area                  | 2011 (£000) | 2016 (£000) | 2021 (£000) |
|-----------------------|-------------|-------------|-------------|
| Total District        | 55,752      | 150,771     | 282,136     |
| Salisbury City Centre | 33,327      | 97,616      | 185,490     |
| Amesbury Town Centre  | 582         | 1,386       | 2,469       |

**Table 8.10: Comparison Goods Baseline Capacity Projections (sq m net)**

| Area                  | 2011 (Sq m net) | 2016 (Sq m net) | 2021 (Sq m net) |
|-----------------------|-----------------|-----------------|-----------------|
| Total District        | 9,181           | 22,488          | 38,115          |
| Salisbury City Centre | 5,031           | 13,346          | 22,970          |
| Amesbury Town Centre  | 117             | 253             | 408             |

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## 9. SCOPE FOR NEW DEVELOPMENT AND RECOMMENDATIONS

- 9.1 Drawing on our qualitative and quantitative analysis, this section considers the scope for accommodating new retail development in the district. We examine Salisbury City Centre, Amesbury Town Centre, and the smaller villages assessed in this report in turn.

### Salisbury City Centre

- 9.2 Our assessment of Salisbury City 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. The centre 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.
- 9.3 The number of comparison outlets is above the national average, the proportion of vacant units is well below the national average, rents have risen in recent years, yields have remained static and demand from retailers for space has increased. The city centre has a good mix of leisure activities including a cinema, night-club, bingo hall, health & fitness club and a theatre. Pedestrian footfall has increased across the centre and overall crime figures have fallen. Shoppers particularly like the environment, the range of well-known/multiple retailers and good selection of independent and specialist stores.
- 9.4 Despite this positive outlook, it is clear from our sub-regional assessment in Section 4, that Salisbury appears to sit between the stronger and weaker centres in the sub-region. We note that this could be a vulnerable position over the LDF period, particularly as competing centres continue to implement major improvements to their town centres.
- 9.5 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 any town centre development to happen in conjunction with protecting and enhancing the historic environment, tourist economy and differential/specialist retail offer. Protecting and enhancing the city's identity is equally as crucial as attracting new investment in order to maintain its higher order position in the sub-regional retail hierarchy.
- 9.6 Our qualitative assessment of Salisbury did identify potential signs of vulnerability and barriers to growth, and consequent opportunities to enhance and strengthen the centre over the forthcoming LDF period. In particular, 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

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number of key attractors missing, including department stores, and higher order and mainstream retailers which are represented in competing centres such as Southampton. The proportion of menswear units is below the national average.

- 9.7 Retailer demand has risen, but the quality of requirements is not sufficient to fill the gaps in provision. Developments in the pipeline will, however, stimulate demand, and we consider Salisbury would be a destination of choice for a number of retailers if the opportunity arose. Although vacancy rates are below the national average, this can represent a barrier to growth, i.e. there is no space for new retailers to enhance provision. At present, Salisbury is not a first choice shopping destination for a number of shoppers who instead choose to visit competing centres such as Southampton. This position will only be exacerbated over the LDF period, as competing centres continue to improve and implement proposals in the pipeline. Our analysis has also identified a weak usage of the centre in the evenings.

## Convenience Goods

- 9.8 In terms of convenience goods, our analysis has highlighted reasonably good foodstore provision in the town centre. This includes the large format J Sainsbury's in the Maltings, and the Tesco Metro and Marks & Spencer foodhall. The qualitative assessment identified that the J Sainsbury was relatively quiet, and the Tesco Metro and M&S were both busy. We consider this may have been a consequence of the timing of the site visit, i.e. in the middle of a weekday. J Sainsbury may be busier during the evenings and weekends when shoppers are undertaking their main food shopping trip, although it did appear that the store was not performing as well as comparable stores elsewhere in the sub-region and UK which are of a similar scale.
- 9.9 The quantitative analysis supports the qualitative findings. The results suggest that J Sainsbury is performing in line with estimated company averages, and Tesco and M&S are performing marginally below expected trading levels. Nevertheless, we would expect a store the size of J Sainsbury, in a city centre location with ample parking, to be trading considerably better than identified in our qualitative and quantitative assessment. This may partly be a consequence of the difficulties of access to the first floor location of the current supermarket site.
- 9.10 Nearby, the Tesco on Southampton Road is trading well, and the Waitrose on Churchill Way is trading marginally above expected company averages. The performance of these stores, which lie within the urban area of Salisbury City Centre has been taken into consideration when forecasting need for additional convenience goods floorspace. The extension of the out-of-centre Tesco has also been taken into consideration, and any identified capacity is over and above this floorspace.
- 9.11 As we have pointed out in earlier sections, it should be noted that any capacity generated in out-of-centre locations does not necessarily justify the development of further out-of-centre floorspace in the district. The sequential approach should be applied to floorspace capacity. In line with Government policy it will be necessary to direct global capacity into the town centres in the first

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instance, in this case, Salisbury City Centre. 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 262 sq m net of additional convenience goods floorspace during the period to 2011. The figures indicate that there will be capacity for an additional 1,178 sq m net by 2016, and 2,145 sq m net by 2021.

- 9.12 We understand that Tesco on Southampton Road has recently submitted a planning application to revise the scheme currently under construction (Ref: S/06/1740). This involves a net reduction in retail floorspace and as a consequence the proposals have already met the key policy tests.
- 9.13 The Maltings site is regarded as the primary retail development site for Salisbury in the Adopted Local Plan and remains a City Centre retail site in the Replacement Local Plan. The Planning Brief published in January 2001 recognises that the Maltings is crucial to the vitality and viability of Salisbury City Centre and its continued success as a retail, entertainment, employment, tourist and residential centre, is to a large extent dependent on the levels of attractiveness of the Maltings area to shoppers and visitors to the city centre.
- 9.14 Planning consent was subsequently granted in June 2003 (Ref: S/2002/0802) for the redevelopment of The Maltings. The redevelopment site comprises the existing Sainsbury's Supermarket, together with linked ground floor car parking, shopmobility site, the adjacent decked car parking structure and the associated Priory Square retail units on the south side of the supermarket. The redevelopment will create a new ground floor supermarket on the site of the old, with car parking on a roof deck, together with an adjacent decked car park. The store will have a gross internal floorspace of 7,200 sq m (4,500 sq m net). This proposal represents an increase of 2,500 sq m above the existing foodstore, and although town centre retail proposals in this location are not required to demonstrate need the Council should be cautious in terms of scale and impact if the floorspace were to increase any further.
- 9.15 Whilst planning permission has been granted to redevelop the Maltings, agreement has yet to be reached on the terms of the Section 106 Agreement and land ownership issues. If the current proposal is not implemented as approved, the Council, at a meeting of Cabinet earlier this year, has indicated that it is still committed to the redevelopment of The Maltings including a larger foodstore. We consider that the Council should maintain this objective over the forthcoming LDF period and be particularly cautious in terms of new out-of-centre foodstore proposals and extensions given the negligible identified capacity. The cumulative effect of city centre and out-of-centre development is likely to result in unacceptable impact on the network of centres in the district.

## Comparison Goods

- 9.16 Driven by a strong forecast growth in retail expenditure and growing competition in the wider sub-region, we consider there is potential to increase, improve and consolidate comparison goods retail floorspace in Salisbury City Centre. In particular, there is a need to bring forward development

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proposals to stimulate demand from higher order, mainstream and quality comparison goods retailers to fill the gaps in provision. This will be important if Salisbury is to maintain its position as a higher order centre in the sub-regional hierarchy as envisaged in the RSS.

- 9.17 The Household Telephone Survey highlights the strong trading performance of the City Centre. With a current turnover of £280.8m, including a 15% inflow from beyond the survey area boundary, the centre has a sales density of £8,722 per sq m net. Based on our experience elsewhere, we consider that Salisbury is performing well in this sector, within expected levels of between £6,000 - £9,000 per sq m net. These figures emphasise the strong trading performance of the City Centre.
- 9.18 Capacity projections identify capacity for additional comparison goods floorspace in Salisbury City Centre over the forthcoming LDF period. On the basis it is able to maintain market share in the face of growing competition, we estimate capacity for circa 5,031 sq m net of comparison goods floorspace by 2009, 13,346 sq m net by 2011 and 22,970 sq m net by 2021.
- 9.19 In order to translate these projections into gross town centre floorspace requirements, it is necessary to incorporate a net:gross ratio. In this scenario, our assessment identifies capacity for 9,106 sq m gross by 2011, 24,156 sq m gross by 2016, and 41,575 sq m gross by 2021, including A2, A3, A4 and A5 floorspace. These figures are based on current market shares, but if an appropriate scheme/s came forward, Salisbury could review the potential to uplift market share through claw-back from competing centres.
- 9.20 At present, Salisbury retains circa 15% of total available comparison goods expenditure within the survey area. The remaining trade is being directed towards the 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.
- 9.21 It is evident that Salisbury City Centre has a number of different shopping areas, both primary and secondary, which also vary in footfall and character quite significantly. The centre varies from the historical central streets of Butcher Row and Ox Row, the more modern Maltings development to the west of the centre, The Old George Mall shopping centre in the south west of the centre, The Cross Keys Mall adjacent to the Market Place, and independent character streets such as Fisherton Street, Castle Street, Winchester Street and Milford Street.
- 9.22 The challenge over the forthcoming LDF period will be to implement new development to suit the requirements of modern format retailers, while maintaining the cohesion of the centre and quality of these different character areas. Whether this is through signage, investment in paving or the introduction of café culture, it is important that development in one part of the city centre will not result in the decline of 'specialist, independent and other' retailing elsewhere in the centre. It is evident from our analysis that one of Salisbury's key strengths is the environmental quality, historic built environment and range of specialist and independent shops.

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- 9.23 Any work commissioned by the local authority to review potential development opportunities in more detail should not consider 'stand alone' sites, and should review the city centre boundary as a whole and the implications of development in one area on other areas. Area Action Plans can be effective means with which to consider the future of town and city centres as a whole, and covers issues such as transport/accessibility, car parking, linkages and connectivity, as well development opportunities in more detail. Any further work should be underpinned by a requirement to maintain the city's historic identity, protect independent and specialist retailers, and enhance the quality of the built environment. This is crucial to maintain its differentiation from competing centres in the sub-region.
- 9.24 We consider that the city centre boundary remains appropriate over the forthcoming LDF period, and primary and secondary retail frontages should be maintained. Within policy formulation, the council should take advantage to recent changes in the Use Classes Order which has introduced a more detailed hierarchy of 'A retail uses' in order to control the introduction of hot food takeaways and drinking establishments.
- 9.25 Fisherton Street is included within the city centre boundary and is not defined as a primary shopping frontage. The street extends some distance from defined primary shopping frontages and could be vulnerable to decline if the centre evolves and footfall drops. The future of the Maltings (discussed further below) could be crucial to maintaining the attractiveness and footfall on Fisherton Street and if the existing consent is not implemented, future design discussions should encourage enhanced linkages with Fisherton Street.
- 9.26 Given its special character and range and choice of specialist and independent shops, we recommend that consideration is given to designate Fisherton Street as a special policy area to protect existing uses, to maintain and enhance the quality of the environment, to prevent the introduction of inappropriate hot food takeaways/A5 uses, and to control the number of A3/A4 uses.
- 9.27 We have identified a number of sites/areas in the city centre that have the potential to accommodate development or redevelopment which would contribute to meeting Salisbury's long term comparison shopping and other needs. The future of these areas and implementation of schemes warrants detailed consideration given the limited nature of available sites to expand/enhance the city centre, and these development opportunity areas should not be wasted in light of growing competition in the wider sub-region. Any schemes which compromise an optimum solution, in terms of poor linkages and piecemeal development should be strongly resisted.
- 9.28 The overall objectives 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.
- 9.29 A number of sites discussed below have been identified in previous advice to the local authority. Circumstances have, however, recently changed which may now enable some sites to come forward
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over the forthcoming LDF period. Notably, the Park & Ride has now been introduced, and although still in its early days, it may enable certain city centre car parks to accommodate new development. The local authority is currently discussing these issues and developing a transportation strategy. Salisbury City Centre is located entirely within a Conservation Area, and any new development on the sites discussed below, and elsewhere, must take into consideration the objective to:

“Protect those features, sites and settlements of historical, architectural and archaeological interest which contribute to the District’s and the nation’s character, whilst ensuring that where new development occurs, it respects and, wherever possible, enhances the environment within which it is located.”

## The Maltings

- 9.30 The Maltings is allocated in the adopted Local Plan (Policy S6) for retail use including the redevelopment and enlargement of the existing foodstore. The site, including the central car park, is regarded as the primary retail development site for Salisbury. It covers approximately 7.54 hectares and is the subject of a published Planning Brief adopted by the Planning Committee as Supplementary Planning Guidance to the Salisbury District Local Plan on 24 January 2001. The boundaries of the Planning Brief site comprise on the east side the Central Channel (River Avon) and on the west side Summerlock Stream and the embankment of the London to Salisbury railway line.
- 9.31 The Planning Brief published in January 2001 recognises that the Maltings is crucial to the vitality and viability of Salisbury City Centre and its continued success as a retail, entertainment, employment, tourist and residential centre, is to a large extent dependent on the levels of attractiveness of the Maltings area to shoppers and visitors to the city centre.
- 9.32 The site has a variety of means of access including to the north from Churchill Way, to the east from Mill Street Approach and Avon Approach and to the south from Malthouse Lane and Summerlock Approach. Pedestrian access is also available from the Cheese Market through Market Walk, from High Street through St Thomas Square, and from Fisherton Street.
- 9.33 The site is currently mainly used as the Central Car Park, which is a large surface car park of approximately 1,500 spaces. The majority of these spaces are for long stay parking. As we have discussed in earlier sections, J Sainsbury is located south of the surface car. It is at first floor level, and our assessment has highlighted that it is under-performing for a city centre anchor foodstore with ample car parking. To the south of the foodstore there are eight unit shops, located on Priory Square and beyond this there is the former C&A outlet fronting onto Fisherton Street. Part of this unit is now occupied by Chicago Rock Café, but a proportion remains vacant to the rear.
- 9.34 We have mentioned the planning consent for redevelopment of the site earlier in this section. The scheme has not yet been implemented as a consequence of land ownership issues and negotiations regarding the Section 106 Agreement. We understand that this scheme may no longer be viable for

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J Sainsbury, although they have confirmed their commitment to the city centre and ambitions to work with the Council to bring forward an appropriate development over the forthcoming LDF period.

- 9.35 Our analysis has identified the under performance of river frontages adjacent to the Maltings in respect of their vitality and contribution to the city centre. The river network is a major asset which is currently under-valued and under-used within the urban area, and there is significant potential to enhance the waterside areas to the benefit of the town centre as a whole. Frontages to the east of the river, to the rear of units on Castle Street are not active and represent a wasted opportunity.
- 9.36 Part of the Section 106 negotiations for the Maltings included provision to improve the river margins, river banks and associated public areas on the eastern side of the supermarket and Central Area car park. It is apparent that plans became well advanced through consultation with the Wiltshire Wildlife Trust. If this scheme is not implemented, we consider the council should encourage these works to be included within any further planning consent.

### Brown Street Car Park

- 9.37 The Brown Street Car Park, owned by the District Council, is located to the south east of the historic core of Salisbury City Centre, and is within easy walking reach of the primary shopping frontages. The site lies to the west of Brown Street abutting the rear of properties fronting onto Catherine Street and the Red Lion Hotel fronting on Milford Street.
- 9.38 Brown Street car park is currently in use for short stay, pay and display City Centre car parking. The car park has approximately 160 spaces, and is accessed via Brown Street which is one way north-south. Pedestrians can also access the site via a walkway through from Catherine Street. The uses currently surrounding the site are largely commercial, with primary shopping frontage on Catherine Street.
- 9.39 The Brown Street Car Park is allocated in the adopted Local Plan (2003) for mixed use development including retail. In view of the close relationship of this site to existing office and retail development, the Local Plan considers that the best use of the site would be a mix of development which should incorporate a retail element. The site has archaeological interest and an archaeological excavation will be required by the County Archaeologist.
- 9.40 Previous advice to the Council stated that the site is approximately 0.433 hectares or 4,330 sq m and could potentially therefore accommodate several relatively large retail units with residential uses above. The advice stated that one issue with this site is likely to be availability, and the Local Plan points out that development on the site will be subject to the implementation of Park & Ride. The Park & Ride scheme has now been partially implemented, and although the Southampton Road facility has not yet happened, we consider that the council could consider releasing the Brown Street Car Park for development, although this is dependent on the conclusions of the Council's transportation strategy.

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## Salt Lane Car Park

- 9.41 Salt Lane Car Park, owned by the District Council, is located to the north east of the historic core of Salisbury City Centre. The car park is located to the outer boundary of the city centre, further from the primary retail frontages than the Brown Street Car Park. It is bounded by Salt Lane to the south, St Edmund's Church Street to the east, Rollestone Street to the west and the rear of properties fronting onto Bedwyn Street to the north. The site is currently used for surface level, pay and display city centre car parking, providing approximately 177 spaces. The surrounding area includes a mix of residential and commercial premises.
- 9.42 Previous advice to the Council stated that the car park is approximately 0.348 hectares or 3,480 sq m and could therefore accommodate some retail development, in conjunction with car parking and a mixed use scheme. It is highlighted that the suitability of this site for retail development may be limited by constraints on design, in relation to the historic environment. The adopted Local Plan (2003) subsequently allocated the site for residential development, stating that a proposal of an appropriate design and scale would significantly improve this unsightly gap in the built fabric of the City.
- 9.43 We consider this site is less suitable than more central sites identified and is too disjointed from existing retail frontages to add significantly to the overall retail offer. As such, it's allocation for residential remains appropriate, and the existing small convenience store on Salt Lane will be sufficient for local top up shopping for the new residents.

## Wiltshire and Dorset Bus Station

- 9.44 The Wiltshire and Dorset Bus Station is located to the north east of Salisbury City Centre. It is located between Endless Street to the west and Rollestone Street to the east, to the rear of properties fronting onto Salt Lane to the north and to the rear servicing yard of properties fronting onto Winchester Street to the south. The site is still in use as Salisbury's main bus station. The site includes a two storey brick building on the southern edge which is the ticket and information office and includes a cafeteria. The site is used for bus waiting, boarding and parking.
- 9.45 Previous advice to the Council stated that the site is well placed for retail development, being located close to primary retail frontages. The site is approximately 0.235 hectares or 2,350 sq m and could accommodate some retail floorspace if developed in its entirety. Today, we consider that the site continues to be suitable for retail development; and viability would have to be considered subject to any proposals for the site.
- 9.46 The key issue continues to be availability as any development could only take place once the bus station had been relocated. The Council are likely to be considering this option within the transport strategy. It is not allocated for development in the adopted Local Plan (2003) and the sites future

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within the forthcoming LDF is likely to be determined following finalisation of the Council's Transport Strategy.

### Land Bound by Scots Lane and Blue Boar Row

- 9.47 This site is located in the north of the City Centre and is bound by Scots Lane, Endless Street, Blue Boar Row and Castle Street. It includes the Telephone Exchange, Gala Bingo Club, Post Office and retail units fronting onto Blue Boar Row including Debenhams. Blue Boar Row lies within the primary shopping frontages, and the site covers a potentially large, central redevelopment opportunity. Given its central location and integration with existing retail frontages, the site offers the possibility to introduce larger, modern units for higher order and quality retailers.
- 9.48 A significant barrier to prompt availability is likely to be land ownership issues, and the viability of redeveloping the telephone exchange. Given the complex technical equipment within a telephone exchange, it is costly to relocate and is often not a viable option. Schemes have come forward in a number of places elsewhere in the UK, however, through mixed use residential and retail development. Ideally, a new format department store could anchor the site to the rear (north) with modern units towards the front close adjacent to existing primary shopping frontages. We recommend the viability of allocating this site for retail in the forthcoming LDF period is given further consideration.

### Leisure Quarter

- 9.49 It is clear from our analysis that the majority of respondents from the telephone and in-centre surveys do not visit Salisbury City Centre in the evening for leisure uses. This is likely to be a consequence of the relatively limited range of evening economy activities. Evidence suggests that a strong town centre leisure economy increases trip time and the overall attractiveness of a town centre. The convenience of a strong mix of town centre uses also increases trip frequency. As discussed in Section 5, we consider there is capacity for an additional 5-7 cinema screens, and other commercial leisure facilities if the market demand is there. Policy should aim to ensure flexibility through encouraging mixed use retail/leisure schemes whilst protecting A1 shop uses in Primary Shopping Frontages.
- 9.50 As such, we recommend the Council gives detailed consideration to allocating an appropriate site for leisure based development. At present, the Odeon cinema and Gala Bingo Hall occupy tight spaces which consequently compromise the quality of offer they provide. They are also sites that would be entirely appropriate for retail uses, and if redevelopment did come forward it would help enhance retail provision in the city centre. Relocation of the cinema could enable Marks & Spencer to expand and enhance its position as a key attractor and anchor retailer in the city centre.
- 9.51 The viability of a leisure quarter should be given further detailed consideration by the Council, particularly if Salisbury is to maintain its role as a higher order centre as envisaged in the RSS, and if

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it is to compete effectively with other centres in the sub-region. Potential sites that could be included in mixed use policy areas include:

- The Maltings/Central Car Park;
- The Brown Street Car Park;
- The Wiltshire and Dorset Bus Station, in consultation with Wiltshire and Dorset County Council's.

9.52 Salisbury should be promoted as the main focus for retail and leisure activity over the forthcoming LDF period. New development on specific sites should not, however, be considered in isolation from the rest of the city centre. Linkages and integration of different sites and schemes should underpin the future of the city centre, and one option to achieve this comprehensive approach is an Area Action Plan. This approach will consider all of the key issues comprehensively, including transport/accessibility, pedestrian circulation and connectivity, linkages and signage and development opportunity sites.

## Amesbury

9.53 Our assessment of Amesbury has identified a relatively healthy town centre, which has experienced substantial investment in recent years. In particular, a replacement Co-Op store has recently opened and an attractive mixed use residential and retail scheme has been completed on the junction of High Street and London Road. The retail composition in the centre 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 monthly market and vacancy rates are significantly below national average levels. On this basis, and given the scale and mix of uses, we recommend that Amesbury is defined as a Town Centre over the forthcoming LDF period.

9.54 In terms of convenience goods the replacement Co-Op foodstore, which has recently opened, will contribute significantly to the health of the centre and its overall attractiveness as a shopping destination. At present, a proportion of trade within Amesbury's core catchment area is being directed towards competing foodstore destinations, outlined in Table 9.1. Any proposals for new foodstore development should take into consideration these market shares and consequent impact upon them.

**Table 9.1: Key Foodstore Market Shares in Zone 2**

| Foodstore                         | Zone 2 Market Share |
|-----------------------------------|---------------------|
| Foodstores: Amesbury Town Centre  | 24%                 |
| Foodstores: Salisbury Town Centre | 12%                 |
| Tesco, Southampton Road           | 15%                 |
| Waitrose, Churchill Way           | 11%                 |

- 9.55 Based on current market shares, we do not consider there is a need for a foodstore over the forthcoming LDF period in Amesbury town centre or the wider urban area. The objective should be to enhance the town centre, and support the role of the new Co-Op foodstore in underpinning the vitality and viability of the town centre. Our health check has identified the strong convenience and service role of Amesbury, and the weak comparison goods sector. Any competing out-of-centre foodstore provision is likely to result in an unacceptable impact on the town centre key role. If foodstore provision in the town centre is undermined, the role of other sectors is not sufficiently strong to maintain the centres health.
- 9.56 Our figures indicate a negative capacity of -29 sq m net by 2016. While a new foodstore in the urban area could claw back some trade lost to other out-of-centre foodstores in the district, we believe such a development will also impact substantially on the town centre. If an appropriate site came forward in the town centre for new foodstore development, we consider that Amesbury could support additional foodstore development through claw back and uplift in market share. Given leakage of trade to competing out of centre foodstore, we consider it possible that an appropriate foodstore development in Amesbury town centre could recapture lost expenditure.
- 9.57 We understand from the Council that is evident development pressures from food retailers in out-of-centre locations in Zone 2, i.e. in Amesbury's catchment area. As a consequence, given our findings in relation to limited capacity, we have tested two scenarios to review the impact of an out-of-centre foodstore on current shopping patterns in and around Amesbury. Following discussions with the Council we have tested the impact of two different sized units: 1,800 sq m net and 2,500 sq m net. While our overall conclusion is that the Council should adopt a cautious approach to new out of centre foodstore development, and these scenarios do not convey any support to either size of unit, it is necessary to quantify a scale of development for the purposes of impact testing to enable the Council to make informed decisions.
- 9.58 The impact model is built in stages. First we model the positive impact the replacement Co-Op foodstore will have on Amesbury town centre. Second, we model the impact a new 1,800 sq m net out of centre foodstore will have on current shopping destinations; and third, we undertake the same exercise on the basis of a 2,500 sq m net foodstore.

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- 9.59 The two foodstore scenarios incorporate the same methodology. First, we calculate the turnover of the proposed schemes; and second, we draw conclusions as to where this trade is likely to come from. The forecast pattern of trade draw for each scenario is assumed to mirror the existing pattern of trade draw to food shopping destinations in Zone 2, i.e. Amesbury Town Centre. We have, however, assumed that a new out of centre foodstore would also draw some trade from Zone 6 and 7. At present, foodstore provision in the district has negligible influence on shopping patterns in Zone 6 and 7, i.e. residents living in these zones are choosing to shop elsewhere.
- 9.60 The model adjusts market shares for each shopping destination in the district accordingly to demonstrate the decline in its trade draw as a consequence of a new foodstore in the district. Appendix 10 (Tables 21, 22 and 23) summarises the findings from the impact assessment. We estimate that the replacement Co-Op foodstore in Amesbury will lead to a 10% uplift in the convenience goods turnover of the town centre, and a 2% impact on out-of-centre foodstores. When testing the consequences of a new out of centre foodstore, we have calculated the cumulative impact of the replacement town centre Co-Op and the new out of centre foodstore.
- 9.61 It is clear that the 2,500 sq m net foodstore will have a greater impact on existing town centres. We estimate a 1,800 sq m net foodstore will have a 4.4% impact on Salisbury City Centre, an 8.1% impact on out of centre foodstores in Salisbury's urban area, and a 33.2% impact on Amesbury town centre. The 2,500 sq m net foodstore will have a 5.8% impact on Salisbury City Centre, a 10.3% impact on out of centre foodstores, and a 37% impact on Amesbury town centre.
- 9.62 Clearly, at 33.2% and 37% respectively, the impact of a large out of centre foodstore on Amesbury town centre is significant. It is likely that a new out of centre foodstore will generate more sustainable travel patterns, ensuring that residents in the north of the district are not having to drive to major foodstore destinations in Salisbury town centre and the out of centre foodstore provision. A larger store would also improve access to a better range of food and non food goods. However, if located outside the town centre, a new foodstore will have a detrimental impact on the health of Amesbury town centre which has recently been enhanced following the opening of a replacement Co-Op foodstore.
- 9.63 As you would expect, the Household Telephone Survey highlights the relatively weak trading performance of comparison goods floorspace in the town centre. This is entirely consistent with our qualitative assessment which identified the below national average representation of comparison goods retailers. As we have already pointed out, Amesbury functions largely as a convenience and service centre. Based on current market shares, our quantitative analysis has identified capacity for an additional 117 sq m net of comparison goods floorspace by 2011, 253 sq m net by 2016, and 408 sq m net by 2021. Our assessment has not identified retailer requirements for space in the centre.
- 9.64 We consider the town centre boundary and designation of retail frontages are appropriate for the forthcoming LDF period. In terms of development opportunities, the foodstore site allocated in the adopted Local Plan (2003) has now been brought forward for development, and there are no evident
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development sites to allocate. The town centre bus station could come forward for development, provided a replacement facility was identified beyond the town centre boundary. This option may be discussed in the Council's Transport Strategy. We would envisage small-scale infill development and redevelopment over the forthcoming LDF period.

- 9.65 While we consider frontage designations are appropriate for the forthcoming LDF period, it is prudent to mention the recently introduced Use Classes Order, enabling local authorities to allow a certain level of A3 quality restaurant and café uses, while preventing undesirable drinking establishments and hot food takeaways in certain locations. Given the current health of the town centre, we believe the local authority should encourage A1 shop uses in the primary frontages, whilst managing a more flexible representation in secondary shopping frontages. For example, retail policies could restrict the proportion of A5 uses, while encouraging A3 uses in certain locations to encourage longer trip times.

## Smaller Centres

- 9.66 The health checks of the smaller centres identified vital and viable shopping and service destinations. Downton, Mere, Tisbury and Wilton all perform well as local village centres offering no more than essential 'everyday' requirements to a local catchment. Each centre has a Post Office, pharmacy and local top-up foodstore. Vacancy rates are particularly low in every centre. Wilton is the largest and busiest centre offering the greatest range of comparison units. Tisbury and Downton appeared the most rural and quiet villages with little through traffic, and Mere is an attractive and vibrant centre with good pedestrian footfall.
- 9.67 Each centre performs a local shopping function, and they do not appear vulnerable to decline in the current circumstances. It is also apparent that growth is unlikely over the forthcoming LDF period given their current function, built environment and rural 'village' settings. As the adopted Local Plan points out, these centres provide a necessary service within the local community and a social forum, especially for the less mobile and those without private transport. The forthcoming LDF period should continue the Council's commitment to retain village shops and resist their change of use. Policy S9 set out in the adopted Local Plan (2003) should be retained.
- 9.68 We consider 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, such as health centres and other small scale community facilities, as encouraged in PPS6. As such the mix of uses in local centres should be carefully managed. In addition to policy to manage the change of use of existing buildings, frontage policies could be introduced in the central shopping area to protect A1 shop uses and other important service facilities. The new Use Class Order can restrict undesirable A5 Hot Food Takeaways within this core area, which will in turn maintain the quality of important service and shop uses in the centre. Resisting change of use in designated frontages, particularly to residential, will help the long term sustainability of the village centres as they aim to implement relevant strategies over the LDF period. If frontage

policies are not put in place, the centre will continue to erode and undermine the overall health of the centres.