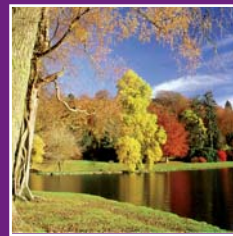


Topic Paper 8



Retail



LDF Topic Paper - RETAIL

Executive Summary

A vibrant retail sector

There are very different challenges affecting the different areas of Salisbury District. There is not just a distinction between rural and urban, but there are different priorities necessary in Salisbury City, Amesbury, Wilton, Tisbury, Mere and Downton and the more rural Hinterland. The more rural areas are dealt with under the Supporting Communities Topic Paper.

National context

The government's planning policy on retail development is set out in PPS6 – Planning for Town Centres. Its main objectives are:

- Promote the vitality and viability of town centres
- Promote, enhance and plan for the growth and development of existing centres
- Enhance consumer choice by making provision for a range of shopping, leisure and local services
- Support efficient, competitive and innovative retail, leisure, tourism and other sectors with improving productivity
- Promote economic growth of regional, sub-regional and local economies
- Deliver more sustainable patterns of development
- Identify the centres where development will be focused, as well as need for new centres of local importance

PPS6 also requires, the core strategy to set out a spatial vision and strategy for the network and hierarchy of centres setting out how the role of different centres will contribute to the overall spatial vision for the area.

When selecting sites for development, local planning authorities, are required, amongst other things to apply the sequential approach to site selection, whilst also assessing the need and impact of the development, identifying appropriate scale of any development as well as ensuring locations are accessible and well service by a choice of means of transport. New development on specific sites should not however be considered in isolation from the rest of the city centre

Local authorities are also required to seek to retain and enhance existing markets through investing in their improvement and where appropriate re-introduce or create new ones.

Regional Context

The draft RSS identifies Salisbury as a Strategically Significant City and Town (SSCT) it recognizes that the SSCT's should be the main focus for investment in retail and other major facilities requiring high levels of accessibility. The RSS also requires the range and quality of central area facilities of market towns be enhanced. The RSS also emphasizes that out of town retail development should be resisted.

County context

The structure plan identifies that employment, shopping, leisure and other service uses which attract large numbers of people should be concentrated at existing town centres.

Local context: Salisbury City

Salisbury city is the biggest retail centre in the district and draws shoppers from a very wide area. A successful shopping centre is important to the City, and to the economy of the District as a whole. The council is keen to maintain its success and its attractiveness.

A retail and leisure needs study has been undertaken for the district by an external consultant, GVA Grimley, a copy of the main report can be found on the Council's website. The study identifies specific floorspace requirements until 2021. It projects that Salisbury city centre needs to provide for the following comparison shopping net floor area up until this time:

Area	2011 (sq m net)	2016 (sq m net)	2021 (sq m net)
Salisbury City	5,031	13,346	22,970

This study also tells us that a number of shops would like more floorspace and new retailers wish to come to Salisbury, however there aren't the shop units available of the size required, also the vacancy rate is low. If we keep Salisbury as it is, without change, it will fall behind other retail centres that we currently compete with such as Southampton, Bournemouth and Bath. This will result in the quality of Salisbury's retail offer diminishing and all retailers will suffer.

It is often not appropriate to convert the smaller shops into larger units because of the unavailability of units and more importantly because this could harm the important historic character of the City Centre. So the only way to provide larger and more shops is to build more.

Salisbury is in a fortunate position to have available land in the city centre at the site of the Central Car Park, and this site could be redeveloped in order to provide for the identified need, potentially through a mixed-use development, whilst also maintaining car parking which is important to maintain for retail development. This proposal backed up by the Salisbury vision. Salt Lane car park, Brown street car park and the bus station could also be made available for retail development.

The study also identifies that any retail development needs to be managed carefully as Salisbury cities retail economy is characterised importantly by an abundance of Niche retailers and a lot of shoppers come to Salisbury for this reason, the needs of these retailers therefore also need to be managed. This could be managed through the maintenance of the City Centre Boundary, Primary and Secondary shopping are frontages that already exist, albeit slightly amended and the designation of Fisherton Street as a Special Policy Area to enhance the niche retailing in this area and its attractiveness to users and retailers.

With respect to convenience floorspace it has been identified that not Salisbury is quite well provided and of the period to 2021 the following floorspace requirement is needed:

Area	2011 (sq m net)	2016 (sq m net)	2021 (sq m net)
Salisbury City	262	1,178	2,145

This could potentially again be provided for on the Central car park site.

The Salisbury vision further identifies that the Southampton Road area of Salisbury should be redeveloped to create an attractive 'Eastern Gateway' as currently the road creates an unwelcoming introduction to our city. It is therefore suggested that the area could be redeveloped to create a new mixed use quarter, however this could result in a loss of 3.86 hectares of retail land, which increases the need for more comparison retail space beyond that already identified.

QUESTIONS

- Without investment in the city centre and the addition of new format retail units Salisbury City centre will experience decline. Should the council build new mixed-use development including retail units on the central car park in order to meet the identified shopping need, which could be anchored by a new supermarket?
- If there is additional retail need on top of what is identified where should it go?
- We feel that the existing town centre and frontage boundaries in Salisbury should remain as they focus retail services, do you agree?

Local context: Amesbury

The Retail and Leisure needs study also looked into retail provision in Amesbury and identified a relatively healthy town centre which has experienced investment in recent years. Amesbury performs a more local shopping function. The centre also has a monthly market. The consultants concluded that the retail composition in the centre is consistent with expectations, however we are told from discussions with local people that since the new Co-op opened in the town centre that individual retailers in Amesbury have started to struggle.

Some people tell us that in order to resolve the situation, Amesbury needs a new supermarket. However the retail and leisure needs study tells us that the following convenience floorspace capacity is needed in Amesbury up until 2021:

Area	2011 (sq m net)	2016 (sq m net)	2021 (sq m net)
Amesbury Town Centre	-131	-29	78

This tells us that quantitatively there is not such need.

Even if there was predicted floorspace capacity, there are no 'in centre' or 'edge of centre' sites within Amesbury, as defined by government planning statements. Our consultants have undertaken some modelling work for us and tested the impact that a supermarket of 1,800 sq m net and 2,500 sq m net would have on Amesbury. Their work concluded that such supermarkets would have a 33.2% and 37% impact on the town centre, taking trade away. We are therefore advised to take a cautious approach to any out of centre convenience provision in Amesbury as any new foodstore located outside the town centre will have a detrimental impact on the health of Amesbury Town Centre.

With respect to comparison goods capacity, the following floorspace is projected:

Area	2011 (sq m net)	2016 (sq m net)	2021 (sq m net)
Amesbury Town Centre	117	253	408

This capacity could be provided for in time in the Town Centre if required.

Our consultants recommend to us that Amesbury should continue to be defined as a Town Centre and that the town centre boundary and designation of retail frontages. However the new use class order 2006 could also be used to allow a certain level of A3 quality restaurant and cafe uses, while preventing undesirable drinking establishments and hot food takeaways in certain locations. We could use this by encouraging A1 shop use in the primary frontages whilst managing a more flexible representation in secondary shopping frontages. For example restrict the A5 uses (hot food take-away) whilst encouraging A3 use (restaurants and cafes).

QUESTIONS:

- An out of town supermarket could kill Amesbury Town Centre. We see Amesbury as functioning as a key service centre, do you wish to maintain this?
- Should the council use their CPO powers to build a site for a new supermarket in the existing town centre even though this could take some years?
- Should the council continue to have a town centre boundary and retail frontage to be used to encourage certain uses in different areas and should these be amended, if so where?
- What kind of uses should be encouraged in the town centre?
- What kind of uses should be encouraged in the primary shopping frontages?

Local context: Other centres

The Retail and Leisure needs survey identified that the smaller centres of Downton, Mere, Tisbury and Wilton are vital and viable shopping and service destinations as well as performing as local village centres offering not more than essential everyday requirements to a local catchment. Vacancy rates are particularly low in every centre. These should therefore be identified as a network of local centres that are meeting day-to-day needs.

Wilton is the largest and busiest centre offering the greatest range of comparison units together with a weekly market, however although appearing healthy, several shop units have recently been granted planning consent for conversion to residential uses. If this trend continues, the health of the centre will decline and will eventually not meet the key service and shopping requirements of the local population. Tisbury and Downton appeared to be the most rural and quiet villages; Mere is an attractive and vibrant centre with good pedestrian footfall. Although the loss of shop units has not yet been experienced in other centres apart from Wilton, this could be the beginning of local centre decline generally.

In order to try and help the centres we are advised that a policy should be developed that could ensure the network of local centres continues to provide easily accessible shopping to meet people's day to day needs and to also encourage these centres to provide other facilities such as health centres and community facilities. Any mix of uses should be carefully managed especially the change of use of existing buildings, a 'commercial strip' policy could be introduced to protect A1 (retail) uses and other important services. The new use class order can also be used to restrict A5 use (hot food take away), which could help to maintain the quality of an area. Without such policies the centres might erode and undermine the overall health of the centres.

Beyond this the community strategies are also telling us other requirements. In the Stonehenge area it is suggested that support should be made for the Durrington local centre. The council could identify this as part of the network of local centres that with an identified 'commercial strip' could help to make the centre more viable. It has also been identified that residential and office use should be allowed above ground floor retail, which could be controlled through frontage policies and that existing markets should be enhanced and maintained.

QUESTIONS?

- Should the council implement a policy to ensure the network of smaller centres (Tisbury, Downton, Wilton and Mere) are maintained?
- Should 'commercial strips' be introduced to the local centres to protect the retail use and other important services whilst also allowing offices and residential above?
- Should the local centre in Durrington be identified and shopping frontages be designated in order to protect the retail use?
- Should the markets be enhanced and how could this be achieved?

LDF Topic Paper

RETAIL

Issues and Options Summary

Salisbury

- Make provision for a range of shopping to support an efficient, competitive and innovative retail sector
- Take opportunities to enhance and strengthen Salisbury as a retail centre through providing for department stores, higher order and mainstream retailers
- Provide new retail units whilst protecting and enhancing the historic environment, tourism economy and the differential and specialist retail offer in Salisbury
- Provide for identified convenience floorspace requirements of (sq m net) 252 by 2011, 1,178 by 2016 and 2,145 by 2021.
- Provide for identified comparison floorspace requirements of (sq m net) 5,031 by 2011, 13,346 by 2016 and 22,970 by 2021.
- Do not provide for any further out of centre foodstore development
- Maintain the city centre boundary, primary and secondary frontages
- Designate Fisherton Street as a Special Policy Area
- Redevelop the Maltings and Central Car park for a mix of uses including retail, anchored by a new food superstore
- Redevelop Southampton Road and create a new mixed use quarter resulting in a loss of 3.86ha of retail land
- Redevelop Salt Lane, Brown Street Car parks and the Bus station to include some retail

Amesbury

- There is no need to allocate a new supermarket in Amesbury due to lack of projected need.
- Provide for a new supermarket in Amesbury
- Provide new comparison floorspace in line with projections of (sq m net): 117 by 2011, 253 by 2016 and 408 by 2021.
- Amesbury town secondary shopping area should be extended to incorporate the area covered by the new Co-op site (allocation S8)
- Need to encourage more A1 (retail) use in primary frontages
- Encourage more A3 (Restaurant and café) use in the secondary shopping area of Amesbury
- Discourage A4 (hot food takeaway) use in the secondary shopping area of Amesbury
- Provide for better shopping and support for Amesbury and Durrington centres

Other centres

- Durrington, Wilton, Downton, Tisbury and Mere should be identified as a network of local centres that are easily accessible and provides shopping to meet day to day needs.
 - Within the local centres designate primary frontages in order to resist change from retail
 - Use other frontage policies in order to resist change from retail (A1)
 - Restrict undesirable take-away's in the core areas
 - Provide a link between Wilton's shopping centre and the centre of the village
 - Support trade and business in Mere
 - Enhance retail units in Downton
 - Allow residential or office above ground floor retail
 - Retain and enhance existing markets and re-introduce or create new ones.
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INTRODUCTION

This Topic Paper seeks to explain the council's approach towards new retail provision, in particular in Salisbury, Amesbury, Mere, Downton, Tisbury, Wilton and Durrington and the basis on which a major new retail development is being proposed for inclusion in the Local Development Framework.

The central objective to Planning Policy Statement 6 (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.

The draft South West Regional Spatial Strategy identifies no retail hierarchy and instead designates 23 Strategically Significant Cities and Towns (SSCT's), Salisbury is among this list. More specifically Salisbury is identified as an important employment, tourism and retail centre.

1. ISSUES FACING SALISBURY DISTRICT

Retail and Leisure Needs Assessment (GVA Grimley – 2006)

In June 2006, GVA Grimley were commissioned by Salisbury District Council to undertake a Retail and Leisure Needs Study for Salisbury district in accordance with Planning Policy Statement 6: Planning for Town Centres.

The appointed consultant was expected to carry out a retail and leisure needs assessment in accordance with the methodology set out in the brief provided and PPS6. The work was split into two categories retail and leisure. The study was required to cover the following facilities in urban and rural areas:

Convenience shopping - including supermarkets, superstores and smaller local outlets.

Comparison shopping - including retail warehouses, retail parks, warehouse clubs, factory outlet centres, regional and sub-regional shopping centres.

Leisure - including cinemas, indoor bowling centres, night clubs, restaurant, bars and fast food outlets, bingo halls and health and fitness centres.

The area of study identified was Salisbury City with a subsidiary study looking at retail and leisure need in Amesbury. The consultants were also required to look at the key rural villages of Tisbury, Mere, Wilton and Downton.

The consultants were required to undertake both quantitative and qualitative need for new retail and leisure floorspace and facilities. Whilst quantitative need takes precedence as the key driver for assessing the level of future retail floorspace needed, qualitative need is also an important aspect of overall need. The assessment of quantitative need for further retail development was based on the catchment area of the retail centres. This catchment extends substantially further than the boundaries of Salisbury District itself.

The remainder of the section now details the findings within the retail study produced by GVA Grimley.

What are the national retail trends?

The key national trends in retailing and service provision is drawn by GVA Grimley from a range of published data sources including research by Verdict Analysis, Mintel and the New Economics Foundation.

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.

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

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.

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.

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.

Sub-regional context

The sub-regional context in retailing and service provision is drawn by GVA Grimley from a range of published data sources including research the Household Telephone Survey undertaken as part of the study, PROMIS, Javelin Venuescore Ranking, Focus Property Intelligence database and Egi. Discussions were also had by GVA Grimley with each of the local authorities to clarify the position regarding development in the pipeline.

The Household Telephone Survey undertaken as part of the GVA Grimley Retail and Leisure Needs Study 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.

Salisbury therefore 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 Venuescore Ranking actually ranks Salisbury marginally higher than Swindon and Bournemouth based on mix of retailer.

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 recognized identity.

Salisbury City Centre: Health Check

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.

Analysis within the GVA Grimley Retail and Leisure Needs Study 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, nightclub, bingo hall, health & fitness club and a theatre. According to data recorded by Salisbury City Centre Management, pedestrian footfall has increased across the centre and overall figures have fallen. Shoppers particularly like the environment, the range of well-known/multiple retailers and good selection of independent and specialist stores.

The GVA Grimley Retail and Leisure needs assessment has 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 that are represented in competing centres such as Southampton. The proportion of menswear units is below the national average.

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 the GVA Grimley study considers that 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, and as identified by the In Centre survey undertaken as part of the GVA Grimley Retail and Leisure Needs study that 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

Overall, the small centres in the District form attractive and traditional towns and villages, and the quality of the environment is excellent in each. Data for local centre health checks is drawn from appendix 3 of the Retail and Leisure Needs Study together with site visits by the consultant.

Amesbury

The GVA Grimley Retail and Leisure Needs assessment has identified that Amesbury has a relatively healthy town centre, which has experienced substantial investment in recent years. In particular, a replacement Co-Op store was under construction at the time of the study, which has now 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 GVA Grimley's 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.

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 as well as a weekly market on a Thursday. 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.

GVA Grimley's 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 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.

Out of Centre Retail Provision

Salisbury has two main edge/out-of-town foodstores. The Tesco store is trading well, and is modern in format and appearance. An extension was under construction at the time of the GVA Grimley retail and leisure needs study, 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.

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.

Capacity Projections

The GVA Grimley Retail and Leisure impact study provide capacity projections. The section draws from data provided by the Experian e-marketer in-house system and indicates 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%. As a result 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%).

The GVA Grimley Retail Needs and Leisure Study 2006 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

Source: GVA Grimley Retail and Leisure Needs Study

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

Source: GVA Grimley Retail and Leisure Needs Study

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

Source: GVA Grimley Retail and Leisure Needs Study

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

Source: GVA Grimley Retail and Leisure Needs Study

Scope for New Development and Recommendations

Salisbury City Centre

The GVA Grimley Retail and Leisure Needs In terms of quantitative and qualitative analysis identify that in a 'do-nothing' scenario Salisbury will fall further behind the larger stronger centres, and it is crucial for Salisbury to encourage investment and new retailers. It is advised that it is 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

In terms of convenience goods, the GVA Grimley Retail and Leisure Needs Study 2006 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 that are of a similar scale.

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.

Nearby, the Tesco on Southampton Road is trading well, and the Waitrose on Churchill Way is trading marginally above expected company averages. Based on the current performance of city centre and out-of-centre convenience goods floorspace, within the city's urban area, the GVA Grimley Retail and Leisure Study 2006 has 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.

Tesco's 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.

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.

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. The GVA Grimley Retail and Leisure Needs Study advises 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

Driven by a strong forecast growth in retail expenditure and growing competition in the wider sub region, the GVA Grimley Retail and Leisure Needs Study considers that 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.

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 the GVA Grimley Retail and Leisure Needs assessment estimates 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.

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 Salisbury 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.

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.

The GVA Grimley Retail and Leisure Needs Study advises that 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.

GVA Grimley 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.

Given its special character and range and choice of specialist and independent shops, GVA Grimley recommend that consideration be given to designating 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.

GVA Grimley 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.

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

The GVA Grimley Retail and Leisure Needs Study advises that 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

GVA Grimley's 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 GVA Grimley's 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, GVA Grimley recommend that Amesbury be defined as a Town Centre over the forthcoming LDF period.

Convenience retailing in Amesbury - In terms of convenience goods the replacement Co-Op foodstore, which has recently now 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%

Source: GVA Grimley Retail and Leisure Needs Study

Based on current market shares, the GVA Grimley Retail and Leisure Needs Assessment does 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. GVA Grimley's 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.

As such, the GVA Grimley retail and leisure needs study indicates a negative capacity of -29 sq m net by 2016 with respect to convenience floorspace. While a new foodstore in the urban area could claw back some trade lost to other out-of-centre foodstores in the district, GVA Grimley 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, GVA Grimley 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, GVA Grimley consider it possible that an appropriate foodstore development in Amesbury town centre could recapture lost expenditure. However, it needs to be reiterated that any such provision needs to be in the town centre.

It is also evident that there is development pressure from food retailers in out-of-centre locations i.e. in Amesbury's catchment area. As a consequence, given findings in relation to limited capacity, GVA Grimley have tested two scenarios to review the impact of an out-of-centre foodstore on current shopping patterns in and around Amesbury. Two different sized convenience scenarios were tested firstly 1,800 sq m net and secondly 2,500 sq m net. While GVA Grimley's 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.

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.

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 that has recently been enhanced following the opening of a replacement Co-Op foodstore.

Comparison retailing in Amesbury – The Household Telephone Survey undertaken as part of the GVA Grimley Retail and Leisure Needs Study highlights the relatively weak trading performance of comparison goods floorspace in the town centre. This is entirely consistent with GVA Grimley's qualitative assessment which identified the below national average representation of comparison goods retailers in Amesbury. GVA Grimley identified that, Amesbury functions largely as a convenience and service centre. Based on current market shares, GVA Grimley's 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.

Town Centre Boundary and Primary and Secondary shopping frontages - The GVA Grimley Retail and Leisure Study considers that 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.

While GVA Grimley consider frontage designations are appropriate for the forthcoming LDF period, it is prudent to mention the recently introduced Use Classes Order, this should

enable 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, GVA Grimley 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

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.

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.

GVA Grimley 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.

Update on study

Since the study was completed, the new Co-op in Amesbury has been completed and is trading. However despite its edge of centre location, local councilors informed us that several A1 retail units have closed although the centre is now beginning to recover.

A tourism Strategy for South Wiltshire

<http://www.salisbury.gov.uk/leisure/tourism/tourism-strategy.htm>

The tourism strategy has been underpinned by the following local evidence base:

Economic impact of tourism in Salisbury - South West Tourism (2003)

Salisbury destination benchmarking victory survey - Tourism South East (2004)

Accommodation facilities in Salisbury - Infrastructure evaluation⁴ Bournemouth University (2005)

Leisure facilities in Salisbury – Infrastructure evaluation - Bournemouth University (2005)
South Wiltshire economic assessment - Salisbury District Council (2005)
South Wiltshire tourism SWOT analysis - Salisbury District Council (2005)
Towards 2015 - Shaping tomorrow's tourism South West Tourism (2005)

This strategy briefly touches on retailing in Salisbury, primarily as retailing's function as a tourist attraction. The Tourism Strategy identifies Salisbury as a popular and well-used shopping centre that is renowned for its high number of specialist independent shops, which sit beside many of the more recognisable national name retailers. It identifies Salisbury's position as an important sub-regional shopping centre that is however being increasingly threatened by new developments in Southampton, Bournemouth and Basingstoke as well as other centres such as Andover, where access and parking are perceived to be better than Salisbury. Winchester, where a major new development is also planned, is also challenging Salisbury's importance and popularity as a retail centre.

Beyond this the tourism strategy contains an action plan which, with respect to retailing, suggests the need to:

- Increase the number of national retailers in Salisbury
- To support the growth and development of Salisbury as a home for independent retailers

More information regarding tourism can be found within the Tourism Topic Paper.

2. THE NATIONAL AND REGIONAL POLICY FRAMEWORK

National Policy Guidance

PPS6 Planning for Town Centres

The main objective of PPS6 is to promote the vitality and viability of town centres. This should be achieved through planning for growth and through the development, promotion and enhancement of existing centres.

- Promote the vitality and viability of town centres
- Plan for the growth and development of existing centres
- Promote and enhance existing centres
- Enhance consumer choice by making provision for a range of shopping, leisure and local services
- Support efficient, competitive and innovative retail, leisure, tourism and other sectors with improving productivity
- Promote economic growth of regional, sub-regional and local economies
- Deliver more sustainable patterns of development
- Identify the centres where development will be focused, as well as need for new centres of local importance

Town Centres and Shopping Frontages

- Development should be focussed in existing centres in order to strengthen and regenerate them
- Actively promote growth and manage change in town centres
- Define a network and a hierarchy of centres each performing their appropriate role to meet the needs of their catchment,
- If provision cannot be accommodated in identified centres, LPAs should plan for an extension of the primary shopping area
- Integrate extension to primary shopping area carefully in terms of design and to allow easy access on foot
- May deliver benefits for consumers and LPAs should seek to make provision for them.
- LPAs should seek to identify, designate and assemble larger sites adjoining the primary shopping area.
- Define the extent of the primary shopping area and the town centre on the Proposal Map
- Identify and allocate sites
- Distinguish between primary and secondary frontages. Develop policies that make clear which uses will be permitted in such locations.

Need for retail development

- Assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative consideration
- Identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including the scope for extending the primary shopping area and or town centre, identify centres in decline where change needs to be managed

Network of centres

- Should consider a network of centres and their relationship hierarchy
- Through Core Strategy set out a spatial vision and strategy for the network and hierarchy of centres, including local centres, setting out how the role of different centres will contribute to the overall spatial vision for their area
- Encourage necessary regeneration in rural service centres.

- Enhance vitality and viability of market towns and other rural centres.
- Designated new centres where need has been established
- Identify opportunities to remedy any deficiencies in local provision
- Market towns and villages should be the main service centres in rural areas.
- Ensure that the importance of shops and services to the local community is taken into account.
- Farm shops can meet demand

Retail allocations

- Review all existing allocations and reallocate sites which do not comply with PPS6
- Scale of opportunity are directly related to the role and unction of the centre and its catchment
- A sequential approach for site selection
- Allocate sufficient sites to meet need for at least first five years from adoption

General retail development

- Set out criteria based policies for assessing and locating new development proposals, including development on sites not allocated in DPDs
- Residential or office development should be encouraged as appropriate uses above ground floor retail, leisure or other facilities.

Night time economy

- Encourage a range of complementary evening and night-time economy uses which appeal to a wide range of age and social groups.
- LPAs should ensure that there is an integrated approach to the evening and night-time economy, so that their planning policies and proposal take account of complement their Statement of Licensing Policy.

Leisure

- LPAs should consider the scale of leisure development they wish to encourage and their likely impact

Markets

- Seek to retain and enhance existing markets and, where appropriate, re-introduce or create new ones.
- Ensure markets remain attractive and competitive by investing in their improvement

<http://www.communities.gov.uk/index.asp?id=1143820>

PPG13 – Transport (With respect to retail development)

- Allocate or reallocate sites which are (or will be) highly accessible by public transport for travel intensive uses (including offices, retail, commercial leisure, hospitals and conference facilities), ensuring efficient use of land, but seek, where possible, a mix of uses, including a residential element;
- Policies for retail and leisure should seek to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments.
- Local authorities should establish a hierarchy of town centres, taking account of accessibility by public transport, to identify preferred locations for major retail and leisure investment. At the local level, preference should be given to town centre sites, followed by edge of centre and, only then, out of centre sites in locations which are (or will be) well served by public transport.
- Where there is a clearly established need for such development and it cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine

the proposal with existing out of centre developments, provided that improvements to public transport can be negotiated.

- Where retail and leisure developments are located in a town centre, or on an edge of centre site as defined by PPG6, local planning authorities should consider allowing parking additional to the relevant maximum standards provided the local authority is satisfied that the parking facilities will genuinely serve the town centre as a whole and that agreement to this has been secured before planning permission has been granted.
- Local planning authorities should ensure that the scale of parking is in keeping with the size of the centre and that the parking provision is consistent with the town centre parking strategy.

<http://www.communities.gov.uk/index.asp?id=1144015>

Regional Spatial Strategy for the South West

- Salisbury is identified as a Strategically Significant City and Town within the RSS, this identifies Salisbury as a primary focus for development offering the greatest opportunities for employment, and the greatest levels of accessibility by means other than car. The strategy emphasis is to realise potential.
- Provision will be made to maintain and enhance the strategic function of these SSCTs through the development of a wide range of commercial and public services, community and cultural facilities and non-car links to the communities that they serve.
- Maximise centre opportunities.
- Improve accessibility of town centres
- Retain and improve the public realm
- Resist retail development out of town centres
- SSCT's to be the main focus for investment in retail and other major facilities requiring high levels of accessibility to the communities they serve recognising their focus as a focal point for extensive catchment area population
- Enhance and maintain the range and quality of central area facilities of market towns to meet future needs. Measures should be introduced to improve accessibility by sustainable modes
- Scale of investment in Retail and other facilities should take full account of changing patterns of behaviour and future levels of population growth

http://www.southwest-ra.gov.uk/nqcontent.cfm?a_id=836

Wiltshire and Swindon Structure Plan 2016 – Adopted April 2006

The structure plan identifies that employment, shopping, leisure and other service uses that attract large numbers of people should be concentrated at existing town centers.

<http://www.wiltshire.gov.uk/environment-and-planning/planning-home/planning-saved-local-plans/planning-structure-plan.htm>

3. LINKING IT TOGETHER – WHAT DO OTHER LOCAL STRATEGIES SAY?

Salisbury Vision

In 2005, Salisbury District Council, the South West of England Regional Development Agency (SWRDA) and Wiltshire County Council established a partnership and appointed consultants to undertake the vision exercise. The Salisbury vision should set out how the city will be in another 1-, 20, 30 plus years. The project will form the basis of an Area Action Plan for Salisbury and Wilton and will propose potential land use changes.

The vision has resulted in 25 options, of which four potentially involve retailing within Salisbury.

Central Car Park and the Maltings: Redevelop the area for a mix of new uses with associated car parking anchored by a new food superstore. The redevelopment of the Maltings could extend towards Fisherton Street and incorporate new open space to act as a public square adjacent to the Salisbury Playhouse and the City Hall. The rearrangement of the island between the Mill Stream and River Avon to become a new park. The proposal would enhance Salisbury as a sub regional shopping centre by the provision of additional large floorplate retail.

Eastern Gateway / Southampton Road: Comprehensive redevelopment of Southampton Road, with the creation of a new mixed use quarter and the development of an 'Eastern Gateway'. With respect to retail development could result in a 3.86 ha loss in land for retail in the area. This would be replaced by residential.

Salt Lane and Brown Street car parks: Redevelop the surface car parks to include residential and retail.

Bus station: Redevelop the surface car parks to include residential and retail

<http://www.salisbury.gov.uk/council/major-projects/vision/vision-progress.htm>

4. PRIORITIES AT COMMUNITY LEVEL.

2005-2009 Community Strategy

There is no mention of the economy or employment land in the South Wiltshire Community Strategy.

<http://www.salisbury.gov.uk/living/your-community/community-planning/community-strategy>

Local Community Plans (Parish, Ward and Market Town Plans)

The following community plans identify economic issues that could be incorporated into the LDF.

Four Rivers community plan - with respect to Wilton would like there to be Link between the Wilton Shopping centre and village to be provided. The area would also like local goods to be promoted by introducing Farmer's markets in areas where they are not established.

Mere and community plan - recognises that trade and business in the town of Mere and in the villages need support to aid sustainability.

Southern Area community plan - Maintain and enhance, where possible, retail units and services within villages

The Stonehenge community plan - Identifies that there is a need for an additional supermarket in the area. Within Durrington there is a need to preserve the current commercial and retail outlets and generally in Amesbury and Durrington better shopping is required. The community area would also like to see the protection of the village shops and post offices.

<http://www.salisbury.gov.uk/living/your-community/community-planning/community-strategy>

Amesbury Community Strategic Plan 2006-2016

Key objectives of the plan relevant to this Topic Paper are to:

- Promote Amesbury as great place to shop, work and visit
- Create better access to town facilities and services

Amesbury residents are concerned about the lack of choice in the quality and range of shops in Amesbury. There is a feeling that local shopping is shifting away from the town centre towards supermarket shopping. Vitality needs to be bought back into the town centre and this must be addressed by encouraging independent retailers with a diverse range of distinctive, interesting, quality products, particularly local food retailers – to be set up business particularly in the town centre itself. The strategy also suggests the local requirement for another supermarket to provide competition for the existing Co-op, small independent food shops such as greengrocers, butchers and fishmongers, teashops and coffee shops.

<http://www.this-is-amesbury.co.uk/pdf/amesburyplan.pdf>

5. LEARNING FROM EXPERIENCE

a) How do our existing policies perform ?

Although these are felt to be satisfactory, these need to be built upon. The existing policies are:

Policy	Purpose	Comment
S1	Prevents change of use within primary frontages if it would undermine the retail function of the town centre. Taking into account certain criteria.	The aim of this policy is to protect retailing in centres, primary frontages could be extended to protect the retail function of not just Salisbury and Amesbury but also Durrington, Tisbury, Wilton, Downton and Mere and furthermore the 2006 use class order could be used in order to protect the retail frontages further.
S2	Allows the change of use in secondary shopping areas subject to certain criteria	This again is to protect retailing in secondary shopping areas. The 2006 use class order could also be used in order to protect retail frontages further.
S3	allows new retail development in defined central shopping areas of Salisbury and Amesbury	This is a positive policy that allows retail development in the central areas; a similar policy statement could be encouraged in the core strategy.
S4	Only allows new retail development outside of defined city/ town centre areas where a shopping allocation exists or no suitable town/ city centre sites are available. Preference to edge of centre sites and exceptionally out of centre locations. Proposals have to meet certain criteria	This restricts retail development; any policy should be amended to be in accordance with PPS6 or just rely on PPS6. If this is important to us locally something similar could be kept.
S5	allows retail development on Brown Street car park as part of a mixed use development	This site has not yet been developed. This site has potential to come forward, based on the work for the Salisbury Vision.
S6	allocates the Maltings to retail use, including the enlargement of the existing foodstore	Planning permission was granted, however there are land ownership issues that have not been resolved. It is proposed in the Salisbury Vision that a larger retail development is to be proposed on the central car park; therefore any policy would need to evolve accordingly
S7	Allocates land between Green Lane and London road for comparison retailing and employment use.	This site has not yet been developed, although an application is expected in the next few months. As this site would now be against PPS6 the allocation should not be taken forward within the Core Strategy.
S8	Allocates the Redworth House site, Amesbury for a new foodstore	This site has now been developed; the area could now be incorporated into the central shopping area of Amesbury.
S9	provides criteria to assess proposals for small-scale shops or the change of use of existing buildings to small scale shops	A much more positive policy should be devised to promote small shops in villages.
S10	Permits alterations to existing shopfronts that respect the historic character and scale of the building / group of buildings	Should a more positive policy be devised and tied in with adverts.
S11	Allows the establishment of small scale farm shops subject to certain criteria	Principles met under PS1 and G2.
S12	Allows new garden centres and extensions to subject to certain criteria	Policy is not effective and not required to achieve its aims.

b) What are others doing to tackle similar problems?

A short benchmarking exercise was undertaken to understand how some other local authorities have dealt with retailing within their Core Strategies. This was achieved through a random internet search.

Sheffield - Identify the strengths and weaknesses of each option identified.

Options include say just office development in city centre or office development anywhere

Maldon – Retail appears in appears in Generic development issues and options. Within the same paper the first section is 'Strategic Issues and Options' which is preceded by a spatial portrait of the area. This section deals with issues such as restricting out-commuting, increasing skills of the workforce, increasing access to the wider community, making public transport more attractive, and establishing the retail hierarchy. The more generic development issues and options deal with the capacity for convenience and comparison goods, response to a low retail turnover, car parking, shopping mix, restaurants and eateries and the retail future of the smaller centres.

Suffolk coastal have proposed a 'preferred' option and then proposed other alternative options. They have further asked if there are any further options that should be pursued. It provides an objective and then asks if there are any other retail issue that should be addressed?

East Cambridgeshire have put together a three page summary for retail which explains the background to the district and the policy requirements, It then asks whether the LDF should protect the shopping function in market towns, prevent shops etc from closing, or allow unrestricted change of use.

Bradford metropolitan have used the Topic paper approach. There are then questions throughout the topic paper asking consultees to comment.

6. KEY ISSUES AND SPATIAL PATTERNS

- Make provision for a range of shopping and leisure, support an efficient, competitive and innovative retail, leisure, tourism sector
- Be cautious of any more out of centre foodstore development including extensions (GVA Grimley retail study)
- Allow residential or office development above ground floor retail (PPS6)
- Retain and enhance existing markets, where appropriate re-introduce or create new ones (PPS6)
- Market towns and villages should be the main service centers in rural areas (PPS6)
- Ensure parking provision is in keeping with the size of the centre. (PPS6)
- Resist retail development out of town centers (submission draft: Regional Spatial Strategy for the South West)

Salisbury

- There is a continued polarisation towards larger centers and the provision of larger stores in these larger centers. Salisbury could be in a vulnerable position as a retail centre especially if competing centers continue to implement major improvements to the town centers. Salisbury is well placed to benefit from forecast spending growth but it needs to adapt if it is to capitalize on these opportunities, and maintain and enhance its position within the wider region. Opportunities should be taken to enhance and strengthen Salisbury centre. (GVA Grimley Retail and Leisure Needs Study)
- Salisbury should encourage investment and new retailers (GVA Grimley Retail and Leisure Needs Study)
- New format retail development should happen in conjunction with protecting and enhancing the historic environment, tourist economy and differential / specialist retail offer. (GVA Grimley Retail and Leisure Needs Study)
- Salisbury should retain its recognized identity, maintain Salisbury's identity and differentiation. (GVA Grimley Retail and Leisure Needs Study)
- Provide for new department stores, higher order and mainstream retailers (GVA Grimley Retail and Leisure Needs Study)
- 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 through an Area Action Plan. (GVA Grimley Retail and Leisure Needs Study)
- Provide for greater menswear units (GVA Grimley Retail and Leisure Needs Study)
- Low vacancy rates represent a barrier to growth. (GVA Grimley Retail and Leisure Needs Study)
- Redevelop Southampton Road /Eastern Gateway and create a new mixed use quarter and the development of an 'Eastern Gateway'. With respect to retail development could result in a 3.86 ha loss in land for retail in the area. This would be replaced by residential. (Salisbury Vision)
- Redevelop Salt Lane and Brown Street Car parks to include residential and retail.
- Redevelop the Bus Station to include residential and retail (GVA Grimley Retail and Leisure Needs Study and the Salisbury Vision)
- Plan for an extension of the primary shopping area, which are carefully integrated (GVA Grimley Retail and Leisure Needs Study)
- Fill the gaps in provision to ensure Salisbury maintains its position as a higher order centre in the sub-regional hierarchy. (GVA Grimley Retail and Leisure Needs Study)
- Maintain city centre boundary, maintain primary and secondary frontages (GVA Grimley Retail and Leisure Needs Study)
- Consider designating 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 hot food takeaways. (GVA Grimley Retail and Leisure Needs Study)
- Redevelop the Maltings and Central Car Park the area for a mix of new uses with associated car parking anchored by a new food superstore. (Salisbury Vision)

- Define the extent of the primary shopping frontages, distinguish between primary and secondary frontages (PPS6)

Floorspace need requirements

The following additionally floorspace requirements has been identified for the district within the GVA Grimley Retail and Leisure Needs Study.

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

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

Amesbury

- There is not a need for a new out of town foodstore in Amesbury over the LDF period. An out of town foodstore would have a detrimental impact on the health of Amesbury (GVA Grimley Retail and Leisure Needs Study)
- Support should be provided for the town centre Amesbury Community Strategic Plan 2006-2016)
- Figures indicate a negative foodstore capacity of –29sq m net by 2016 (GVA Grimley Retail and Leisure Needs Study)
- Amesbury's town centre boundary and designation of retail frontages are appropriate for the LDF period. Should encourage A1 shop uses in primary frontages (GVA Grimley Retail and Leisure Needs Study)
- Manage a more flexible representation of secondary shopping frontages for example retail policies could restrict the proportion of A5 uses, while encouraging A3 uses in certain locations (GVA Grimley Retail and Leisure Needs Study)
- A local wish for a additional supermarket in the area (The Stonehenge community plan, Amesbury Community Strategic Plan 2006-2016)
- Amesbury and Durrington need better shopping (The Stonehenge community plan)

Other villages

- Network of smaller centres provides easily accessible shopping to meet day to day needs (GVA Grimley Retail and Leisure Needs Study)
- Maintain quality of important service and shop uses in network of centres. (GVA Grimley Retail and Leisure Needs Study)
- Resist change of use in designated frontages, particularly residential to hep long-term sustainability. If this is not achieved centres will erode. (GVA Grimley Retail and Leisure Needs Study)
- Manage change of use with frontage polices to protect A1 shop uses and other important services (GVA Grimley Retail and Leisure Needs Study)
- Restrict undesirable A5 hot food takeaways in core areas. (GVA Grimley Retail and Leisure Needs Study)
- Define a network and a hierarchy of centres each performing their appropriate role to meet the needs of their catchment (PPS6)
- Provide a link between the Wilton's Shopping Centre and the centre of the village (Four Rivers Community Plan)
- Trade and business in Mere needs support to aid sustainability (Mere and Community Plan)

- Maintain and enhance retail units in the southern villages (Southern Area Community Plan)
- Need to preserve Durrington (Stonehenge Community Plan)
- Define the extent of the primary shopping frontages, distinguish between primary and secondary frontages (PPS6)

7. OPTIONS

Based on the issues identified and the policy framework in place, this section draws together options. The tables below represent a long list of options from which the most realistic are identified in the final row. The impacts identified are compared against the sustainability criteria in the Appendix of this topic paper

Option No.	Nature of the Option	Key Drivers	Positive Impacts	Negative Impacts	Viability of proceeding with the option?	How will success be measured	Where is the option best pursued?
1	Without investment in the city centre and the addition of new format retail units Salisbury City centre will experience decline. Should the council build a new mixed-use development including retail units on the central car park in order to meet the identified shopping need, which could be anchored by a new supermarket?	GVA Grimley Retail and Leisure Needs Study, Salisbury Vision	Continued vibrant city for Salisbury that will ensure it is viable into the future. Encourage implementation of the car parking strategy.	May be disruption during construction, potential loss of car parking revenue for the council.	The cost of construction together with additional improvements should be able to be met by any chosen developer.	Identified retail need being met in Salisbury through the construction of a high quality development.	Core Strategy followed by Salisbury and Wilton Area Action Plan.
2	Do not invest in Salisbury City Centre.	None	Few.	Salisbury City Centre may decline.	Viable, as no change would be needed.	N/A	Do not pursue.
3	Should Southampton Road be redeveloped and if so where should the displaced retail floorspace go?	Salisbury Vision	A welcoming gateway to Salisbury is created that is not congested.	Again there may be disruption during construction and whilst changes are occurring.	The cost of construction together with additional improvements should be able to be met by any chosen developer. Retail operators may need incentives to move.	The introduction of a welcoming gateway to Salisbury.	Core Strategy followed by Salisbury and Wilton Area Action Plan.
4	Should the primary and secondary frontages that exist be maintained?	PPS6, GVA Grimley Retail and Leisure Needs Study, continuation of Local Plan frontages.	Planning policy is able to control the uses within certain areas in order to ensure that the correct mix of town centre uses are	If demand was not there, shop units could remain empty; this is unlikely to occur in Salisbury.	Continuation of a similar policy that already exists, however more control can now be had through the new use class order.	Providing a health mix of town centre uses.	Core Strategy followed by Salisbury and Wilton Area Action Plan

Option No.	Nature of the Option	Key Drivers	Positive Impacts	Negative Impacts	Viability of proceeding with the option?	How will success be measured	Where is the option best pursued?
			implemented. This needs to be carefully managed alongside any proposed retail development.				
5	Should Fisherton Street be designated as a Special Policy Area?	PPS6, GVA Grimley Retail and Leisure Needs Study and the recognition that Fisherton Street is important to the vibrancy of Salisbury.	Fisherton Street should not only remain an important shopping area of individual retailers but the area is enhanced and improves.	There should ideally be few negative impacts is a policy is constructed correctly.	There is no reason why this cannot be implemented.	Fisherton Street remains an important area of individual and local retailers.	Core Strategy and Salisbury and Wilton Area Action Plan.
6	Do not designate Fisherton Street as a policy area.	None.	Few.	Fisherton Street may decline if it is not protected.	Viable.	N/A	Do not pursue.
7	Are there any other ways we could support the niche retailers in the City?	GVA Grimley Retail and Leisure Needs Study.	May be able to help ensure the continued existence of Niche retailers in Salisbury that are so important to drawing shoppers to our centre.	N/A	N/A	N/A	Core Strategy and Salisbury and Wilton Area Action Plan.
8	Amesbury - Should a new out of centre supermarket be provided in Amesbury even if this may have a negative impact on the town centre?	Local Councillors.	People in Amesbury have a greater choice of supermarket shopping.	Shops in Amesbury Town Centre close, as they are unable to compete with the supermarket, resulting in Amesbury dying as a centre.	As there are no available sites in the Town Centre or edge of centre, this is against government policy. Even policy measure potentially could not save shops closing so it may be difficult to provide counter policies.	Amesbury Town Centre is enhanced and becomes more prosperous, however if this measure is pursued this is unlikely to occur.	It is best if this measure is not pursued.
9	Amesbury - Should the council use their CPO powers to build a site in the town centre even though this could take some years	Pressure from Local councillors to deliver a new supermarket in Amesbury.	People in Amesbury have a greater choice of supermarket shopping.	Some buildings in Amesbury town centre may need to be compulsorily purchased and demolished.	Be very cautious. This could be achieved, however, it takes a long time and would take a large amount of officer time and cost in order to be achieved.	The construction of a new convenience store in Amesbury Town Centre.	Core Strategy, Site Specific Allocations, however the council need to be cautious.
10	Amesbury - Should	PPS6, GVA Grimley	Planning policy is	If demand was not	Continuation of a	Providing a health mix	Core Strategy.

Option No.	Nature of the Option	Key Drivers	Positive Impacts	Negative Impacts	Viability of proceeding with the option?	How will success be measured	Where is the option best pursued?
	the council continue to have a town centre boundary and retail frontage to be used to encourage certain uses in different areas and should these be amended, if so where.	Retail and Leisure Needs Study, continuation of Local Plan frontages.	able to control the uses within certain areas in order to ensure that the correct mix of town centre uses are implemented. This needs to be carefully managed.	there, shop units could remain empty. This could be a concern for Amesbury.	similar policy that already exists, however more control can now be had through the new use class order.	of town centre uses.	
11	Amesbury - What kind of uses should be encouraged in the town centre?	N/A	N/A	N/A	N/A	N/A	Core Strategy.
12	Amesbury - What kind of uses should be encouraged in the primary shopping frontages?	Use Class Order 2006.	The council is able to use the Use Class Order in order to control the proportion of various town centre uses.	If implemented correctly there should be few negative impacts.	High.	A mix of quality town centre use.	Core Strategy
13	Local centres - Should the council implement a policy to ensure the network of smaller centres (Tisbury, Downton, Wilton and Mere) are maintained?	PPS6, GVA Grimley Retail and Leisure Needs Study.	The local centres remain viable.	If implemented correctly there should be few negative impacts.	High	The Local centres continue to perform as such and the variety of provision is enhanced.	Core Strategy
14	Should the council not support a network of smaller centres.	None.	Probably very few as centres may decline.	Local centres may decline.	Viable.	N/A	Do not pursue.
15	Local Centres - Should a central shopping area be introduced to protect the retail use and other important services whilst also allowing	PPS6, GVA Grimley Retail and Leisure Needs Study.	The local centres remain viable	If implemented correctly there should be few negative impacts.	High	The Local centres continue to perform as such and the variety of provision is enhanced.	Core Strategy

Option No.	Nature of the Option	Key Drivers	Positive Impacts	Negative Impacts	Viability of proceeding with the option?	How will success be measured	Where is the option best pursued?
	offices and residential above?						
16	Local Centres- Should primary frontages be designated and polices introduced to protect the retail use further for example restricting A5 use (hot food take-aways)?	PPS6, GVA Grimley Retail and Leisure Needs Study.	The local centres remain viable	If implemented correctly there should be few negative impacts.	High	The Local centres continue to perform as such and the variety of provision is enhanced.	Core Strategy
17	Local Centres - Should the local centre in Durrington be identified and shopping frontages be designated in order to protect the retail use?	Stonehenge community plan.	Local shopping facilities in Durrington are protected.	Unknown.	High	The Local centres continue to perform as such and the variety of provision is enhanced.	Core Strategy
18	Local Centres - Should a link be provided between Wilton Shopping Centre and the village centre? Where could this go?	Four Rivers community plan.	Wilton becomes more integrated and the centre becomes more viable.	Wilton shopping centre takes over as the centre.	Due to historic and densely built nature of Wilton it may be difficult to identify a link.	An integrated link is created.	Core Strategy and Salisbury and Wilton Area Action Plan.
19	Local Centres - Should the markets be enhanced?	PPS6, Four Rivers community plan.	The market becomes more attractive to shoppers, enhancing the incomes of local producers.	Unknown.	Although the core strategy can encourage enhancement, a revenue stream would need to be identified to achieve this, this potentially could be achieved through section 106 contributions?	Enhanced markets and more prosperous communities.	Core Strategy and Salisbury and Wilton Area Action Plan.
20	Do not enhance the markets.	None.	Probably very few.	Unknown.	Viable.	N/A	Do not pursue.

8. INITIAL CONSULTATION

Sent to economic development and City Centre Manager, comments received back verbally from the City Centre Manager.

Copies were also sent to the following on 1st June 2007 for comments:

- South Wiltshire Economic Partnership
- Wiltshire and Swindon Economic Partnership
- Salisbury tourism Partnership
- Wiltshire Rural Regeneration Partnership
- Wiltshire Market Towns Partnership

No comments were received.

9. **Bibliography**

Amesbury Community Strategic Plan 2006-2016

<http://www.this-is-amesbury.co.uk/pdf/amesburyplan.pdf>

A tourism Strategy for South Wiltshire

<http://www.salisbury.gov.uk/leisure/tourism/tourism-strategy.htm>

Local Community Plans (Parish, Ward and Market Town Plans)

<http://www.salisbury.gov.uk/living/your-community/community-planning/community-strategy>

PPS6 Planning for Town Centres

<http://www.communities.gov.uk/index.asp?id=1143820>

PPG13 – Transport (With respect to retail development)

<http://www.communities.gov.uk/index.asp?id=1144015>

Regional Spatial Strategy for the South West

http://www.southwest-ra.gov.uk/nqcontent.cfm?a_id=836

Retail and Leisure Needs Study 2006 (GVA Grimley – 2006)

Salisbury District Council - 2005-2009 Community Strategy

<http://www.salisbury.gov.uk/living/your-community/community-planning/community-strategy>

Salisbury Vision

<http://www.salisbury.gov.uk/council/major-projects/vision/vision-progress.htm>

Wiltshire and Swindon Structure Plan 2016 – Adopted April 2006

<http://www.wiltshire.gov.uk/environment-and-planning/planning-home/planning-saved-local-plans/planning-structure-plan.htm>



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