WEST DORSET DISTRICT COUNCIL WEYMOUTH AND PORTLAND BOROUGH COUNCIL

Joint Retail and Leisure Study

Supplementary Assessment of other West Dorset Market Towns

FINAL REPORT

December 2008

CBRE
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APPENDICES

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INTRODUCTION

INTRODUCTION

1.1 In August 2007, Weymouth and Portland Borough Council and West Dorset District Council instructed CB Richard Ellis (CBRE) to produce a Joint Retail and Leisure study to provide evidence towards their respective Local Development Frameworks (LDF).

1.2 While the main study has undertaken an assessment of future retail and leisure capacity within Weymouth and Dorchester, this document will assess the need covering retail, commercial leisure and other town centre uses for the smaller West Dorset market towns of:

- Bridport;
- Sherborne;
- Lyme Regis; and
- Beaminster.

Aims and Objectives

1.3 As established in the main report the specific project requirements of Weymouth and Portland Borough Council and West Dorset District Council are summarised below:

- Quantify the need for retail, leisure and other town centre uses in the study area over the next 20 years (until 2026).
- Consider the options for how this need can best be met.
- Devise an appropriate hierarchy of town centres to assist the provision of these needs; in particular assessing how the towns relate to each other and the extent to which their roles are complementary or competing.
- Identify centres and sites to accommodate any additional floorspace requirements.

Scope of Work

1.4 In order to fulfil the specific project requirements, CBRE has produced this supplementary report for the smaller West Dorset towns of Bridport, Sherborne, Lyme Regis and Beaminster.

1.5 This study includes:

- An overview of the existing and proposed retail and town centre uses, roles and current health of Bridport, Sherborne, Lyme Regis and Beaminster; and
- An assessment of need for any additional retail or town centre development.

1.6 This report should however be read in conjunction with the main report, *'Joint Town Centre Retail and Leisure Study, Weymouth and Dorchester'*, December 2008 which provides the back ground assumptions to the report (Section 5), including an overview of relevant, national, regional and local planning policy guidance (including planned housing growth) (Section 2), and details of the recent and likely future national retail and leisure trends (Section 3). The main report also provides a detailed explanation of the methodology employed in assessing capacity and need, includes the main study conclusions and makes recommendations for the Council's future strategy in relation to Weymouth and Dorchester town centres and urban areas.

Scope of Report

1.7 The remainder of this report is set out as follows:

- Section 2 includes health checks of Bridport, Sherborne, Lyme Regis and Beaminster town centres;
- Section 3 identifies the findings of the retail capacity forecast for each centre;
- Section 4 provides a sequential site assessment on the sites identified as a result of the health check; and
- Section 5 provides a summary and conclusions for the smaller West Dorset towns.

2

THE VITALITY AND VIABILITY OF BRIDPORT, LYME REGIS, SHERBORNE AND BEAMINSTER CENTRES

THE VITALITY AND VIABILITY OF BRIDPORT, LYME REGIS, SHERBORNE AND BEAMINSTER CENTRES

2.1 In this section of the report, the findings of the Bridport, Sherborne, Lyme Regis and Beaminster health checks are given drawing on the indicators set out in paragraph 4.4 of PPS6 and site visits undertaken by CBRE in October 2007.

2.2 To assess the vitality and viability of the centres we have drawn upon Experian GOAD data, combined with observations gained from site visits.

2.3 The GOAD data maps broadly follow the town and town centre boundaries given within the Local Plan Proposals Map, and split retail provision between convenience, comparison and service retail categories. According to Table 3 in PPS6:

"Convenience retailing is the provision of everyday essential items including food, drinks, newspapers/magazines and confectionery;" and

"Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods."

2.4 Within the convenience category, GOAD includes bakers; butchers; greengrocers and fishmongers as well as well as off licences'; and confectionery, tobacco and news (CTN). Categorised as comparison goods, GOAD includes; clothing; furniture and textiles; books, crafts and stationery; DIY and household goods, as well as florists; jewellers and charity shops. In terms of service provision, GOAD includes restaurants, cafés and fast food; hair and beauty; laundrettes and dry cleaners; travel agents and banks as well as building societies and estate agents.

2.5 In addition to Experian GOAD, we have relied upon available in-house data, information provided by the Council, together with other research resources such as Promis and Focus Centre reports.

Bridport

2.6 The historical market town of Bridport lies on the A35 between Lyme Regis to the West and Dorchester to the east. The town's main shopping area is configured in a T shape comprising East, West and South Street. These streets benefit from wide pavements and on-street parking.

2.7 Markets are held regularly along the road side. The entire retail area falls within a Conservation Area and the majority of the buildings are listed or of architectural merit.

Key Health Check Indicators

Diversity of Main Town Centre Uses

2.8 The retail composition by unit numbers of Bridport is given in the table below.

Retail and Services Provision in Bridport by Number of Units

Retail Category	No. of Units	% of Total	National Average %	Variance %
Convenience	18	10.9	9.1	1.9
Comparison	86	52.1	45.6	6.5
Service	54	32.7	33.1	-0.3
Vacant	7	4.2	10.9	-6.7
TOTAL	165			

Source: GOAD Experian Report 2006; Update by CBRE Nov 2007

Note: Miscellaneous excluded.

2.9 The percentage of convenience units in Bridport (10.9%) is above the national average (9.1). In terms of comparison uses, Bridport is again above national average representation at 52% compared with a national average of approximately 46%. In contrast, proportion of retail services within Bridport town centre is broadly similar to the national average.

2.10 When studied in terms of floorspace, Bridport's convenience offer is below national average, indicating that the provision is generally provided in smaller sized units. Interestingly, service provision is provided in a larger than average sized units, perhaps reflecting the importance of this sector to the town's function.

Retail and Services Provision in Bridport by Floorspace

Retail Category	Floor Space (sqm)	% of Total	National Average %	Variance %
Convenience	3,502	12.5	16.6	-4.1
Comparison	15,106	53.7	51.3	2.4
Service	8,742	31.1	21.7	9.4
Vacant	771	2.7	9.3	-66
TOTAL	28,121			

Source: GOAD Experian Report 2006; Update by CBRE Nov 2007

Note: Miscellaneous excluded

2.11 In terms of other town centre uses, Bridport has a reasonable stock of residential units, located above retail premises and to the rear of the main shopping streets. Office uses are far less prevalent, save for a number of local small scale service providers. We are also aware that rents are low for office space and demand is weak.

2.12 In terms of commercial leisure provision, Bridport has a limited offer, which is essentially public sector led, such as the library, arts centre and museum/gallery. These uses do however point towards a more cultural offer, and a role could be encouraged to differentiate the town from other competing centres. This might be coupled with attracting new restaurants/cafes to the centre and increasing the dwell time.

Retail Commitments

2.13 There are no retail planning commitments identified within Bridport.

Retailer Representation

2.14 The table below identifies 'key' multiple retailers in Bridport as defined by GOAD Experian. These retailers are acknowledged to be important in attracting shoppers.

Key Attractors in Bridport Town Centre

Key Retailer	No.	Key Retailer	No.
Argos	0	New Look	1
BhS	0	Next	0
Boots the Chemists	1	River Island	0
Burton	0	Sainsbury's	0
Carphone Warehouse	0	Superdrug	1
Clarks	0	Tesco	0
Clintons	1	Topman	0
Currys	0	Topshop	0
Debenhams	0	Virgin Megastore	0
Dorothy Perkins	0	Vodafone	0
H&M	0	WHSmith	1
HMV	0	Waitrose	0
House of Fraser	0	Waterstones	1
John Lewis	0	Wilkinsons	0
Marks & Spencer	0	Woolworths	0

Source: Experian GOAD, CBRE Centre Survey 2007.
NB: Since conducting the health checks, Woolworth stores have ceased trading.

2.15 There is a limited provision of key attractor stores and indeed national multiples generally within the town and no department stores. Multiples include Superdrug, WH Smith, Waterstones, Clintons Cards, New Look and Boots the Chemists. Since conducting the health checks, Woolworth stores have ceased trading and the store in Bridport currently remains vacant. Waitrose has also recently bought the Somerfield foodstore in the town centre. Arguably, if Bridport is to enhance its shopping role then a greater representation of key multiple retailers in the centre would be welcome.

Retailer Demands

2.16 Eight retailers currently have requirements to locate in the centre (Focus 2007). These comprised only comparison providers including Robert Dyas, Pets at Home and Julian Graves Health Foods. The total floorspace required is between 15,950 sqft (1,481 sqm) and 43,900 sq ft (4,078 sqm). This level of demand is fairly typical for a centre of Bridport's scale. The currently available units are however unlikely to meet their requirements. The requirement by Pets at Home is likely to be for edge/out-of-centre space such as at the Asker Meadows Retail park thereby reducing the overall demand for the town centre.

Shopping Rents

2.17 There is limited rental data for Bridport. The last records were taken in 1/11/06 which identified that prime retail rents were at £35 per sq ft Zone A (Focus 2007). At this rental level retail development is financially marginal. The rent is however commensurate with a centre of Bridport's scale and status.

Commercial Yields

2.18 According to the Valuation Office Property Market Report retail yields within Bridport were about 8.75% in July 2007. This reflects a rather weak retail investment market for Bridport. We would however expect a keener yield than this were a well located unit, let to a good tenant, to come to the market.

Vacant Retail Property

2.19 As at October 2007 there were four vacant units within the centre. This represents a fall since the GOAD Survey of 2006. These units are located at the periphery of the centre. The low level of vacancies indicates a healthy town centre. The majority of the units within the town are small in scale which again may deter national multiple retailers locating to the town.

Pedestrian Flows

2.20 The centre had a strong flow of pedestrians along West Street, particularly at the Somerfield store, and at the junction of South, East and West Street. There was a lower presence of pedestrians towards the southern end of South Street and also at the eastern end of East Street. Nevertheless, pedestrian flows are generally good, and create a vibrant atmosphere.

Accessibility

2.21 The town is fairly accessible. By car, the town is well served by several large car parks; most of these are located behind the main road frontage. The centre also benefits from a considerable amount of on street parking.

2.22 Regular buses serve the town to and from the surrounding major centres with the bus station at the western edge of the centre. Bus stops are located along West

Street and East Street allowing good access to the retail core for public transport users. The town has no rail connections.

2.23 With Bridport serving a largely rural population, the adequate provision of parking is important to the town's continuing access. In particular, the availability of on-street parking helps support the town's shopping role.

Environmental Quality

2.24 Within Bridport we undertook an environmental management audit of the centre. This involved giving a score, 1 to 5, with 1 being 'very poor' and 5 being 'excellent' to a number of different environmental criteria. The scoring system is conducted for the centre and the aggregated results are set out below:

State of Bridport Town Centre Environment

Summary	Average Score
Condition of carriageway [loose, broken, missing, uneven, temporary, obstructions]	3
Seats/planters/hanging baskets/litter bins [paintwork, broken, uneven, parts missing, not working, badly sited, not present]	5
Public facilities, telephones, bus stops/shelters (condition]	3
Graffiti, fly-posting, vandalism	4
Market stalls and Street traders [tidiness, waste disposal, appropriateness to street]	3
Barriers to movement [servicing, general traffic, lack of safe crossing facilities etc.]	4
Cycle parking [formal or informal, availability, capacity]	3
Maintenance and repair of buildings, shopfronts and canopies	5
Personal security and police presence	4
Wheelchairs access and facilities for the blind or partially sighted	3
Average Total	3.9

Source: CB Richard Ellis (2007)

2.25 The good quality historic built form and well maintained buildings are very important attractions for Bridport. Although the town remains open to traffic, the wide streets, well maintained frontages, trees and street furniture create an attractive and interesting environment. There are regular pedestrian crossings which prevents the two sides of the streets from being severed. As a result the environment is considered to be of a good standard.

2.26 The perception of safety in the town centre is generally very good. The town had attractive streets which were wide and were generally overlooked by dwellings above the shops which provide natural surveillance.

Out of Centre Retail Provision

2.27 The Asker Meadows Retail Park situated on the edge of Bridport is occupied by Morrison's (1,525 sqm net), providing the area's main convenience store. The store's out of centre location does little to contribute to Bridport town centre.

Potential of the Centre to Grow

2.28 Bridport offers some potential to extend its retail offer, subject to sufficient demand and the ability to create a viable scheme. The main opportunities in Bridport are:

- Rope Walks – a surface car park, together with a number of adjacent land ownerships, forming a significant regeneration opportunity.
- The Bus Station and Depot - a site at the western edge of the town centre, currently characterised by low intensity uses.

2.29 These sites, their opportunities and constraints are discussed in more detail at Section 4.

Summary

2.30 Bridport town centre is considered to function effectively. There is a fairly good mix and diversity of uses and relatively few vacant units. Together this indicates that there is a good vitality to the town. The built form is attractive and well maintained and this adds further to the quality of the centre. Were Bridport to maintain and enhance its shopping role, then this would probably require the provision of new, suitably sized retail units to be attractive to national occupiers. Bridport offers several key development opportunities to achieve this. The cultural aspects to Bridport might also be fostered to maintain a sense of individuality to the centre.

Lyme Regis

2.31 Lyme Regis is a small seaside town situated on the side of a steep hill and is tightly configured. The main retail provision is located on Broad Street leading up the hill to Pound Street. There is a fairly diverse mix of units within the centre. The centre also accommodates a library and a cinema as well as a small theatre. There are also a number of hotels which serve the strong tourist trade. The role of the centre is a mixture of both meeting shorter term resident's needs and acting as a popular leisure orientated destination.

Key Health Check Indicators

Diversity of Main Town Centre Uses

2.32 Lyme Regis has a strong representation of comparison retailers. This sector represents around 53% of the units, compared with the UK average of approximately 46%. The service sector representation (29.3%) is considered acceptable for a centre of this size, although it is below the UK national average (33%). This level of service sector representation is typical for a small town where the centre is serving a more localised need. Likewise, the good representation of convenience operators is usually associated with smaller centres; for a centre of Lyme Regis' modest scale this is often important in supporting a healthy centre. An above average representation is therefore encouraging, albeit that these stores are fairly small.

Retail and Services Provision in Lyme Regis by Number of Units

Retail Category	No. of Units	% of Total	National Average %	Variance %
Convenience	13	14.1	9.1	5
Comparison	49	53.3	45.6	7.7
Service	27	29.3	33.1	-3.8
Vacant	3	3.3	10.9	-7.6
TOTAL	92			

Source: GOAD Experian Report 2006; Update by CBRE Nov 2007

Note: Miscellaneous excluded

2.33 Whilst a high service sector retail representation is often associated with a weaker centre, the range of services available at Lyme Regis is broad and includes a variety of independent hairdressers, beauty salons, solicitors as well as leisure facilities such as a library, theatre and a cinema.

2.34 The main food store in the centre is the Co-op: there are also several grocers, butchers and bakers. Together they provide a good range of food stuffs. It is acknowledged that the majority of the residents however are more likely to shop elsewhere for their 'main' food shopping.

2.35 The range of comparison operators is also reasonable, albeit that many traders are seeking to capture tourism trade rather than just to meet more local needs. The centre in general is very vibrant, and enhanced by the picturesque seaside town and its setting.

Retail and Services Provision in Lyme Regis by Floorspace

Retail Category	Floor Space (sqm)	% of Total	National Average %	Variance %
Convenience	1,793	18.1	16.6	1.5
Comparison	5,082	51.3	51.3	0
Service	2,796	28.2	21.7	6.5
Vacant	232	2.3	9.3	-7
TOTAL	9,903			

Source: GOAD Experian Report 2006; Update by CBRE Nov 2007

Note: Miscellaneous excluded

2.36 When the retail mix is considered in terms of floorspace, this shows a similar composition to that of the unit analysis, save for the town having a higher amount of floorspace providing convenience goods than the national average. Again, this is typical for smaller centres. The figures also demonstrate that while there is above average comparison provision this offer is provided in somewhat smaller units than the national average.

2.37 In terms of other town centre uses, the town's leisure provision is predominantly focused on serving day time trade. A key leisure attribute – and one which arguably underpins the strength of the centre – is its natural resources; the attractive seafront. Combined with the restaurants, bars, small cinema and theatre, Lyme Regis has a good leisure offer given the relatively small size of the centre.

2.38 As would be expected, there is no large scale office provision within the town centre. There are several independent solicitors, accountants and other professional service providers operating above shops or in premises on the edge of the town centre. In all likelihood, any further requirements for office space in Lyme Regis would probably arise from local enterprises with larger/regional requirements seeking accommodation in higher order commercial centres.

2.39 The town has a good stock of residential dwellings within the centre. This use and mix adds activity and character to the centre, as well as providing natural surveillance and stewardship of the town.

Retail Commitments

2.40 There are no significant outstanding retail planning commitments identified within Lyme Regis.

Retailer Representation

2.41 The table below identifies 'key' multiple retailers in Lyme Regis as defined by GOAD Experian.

Key Attractors in Lyme Regis Town Centre

Key Retailer	No.	Key Retailer	No.
Argos	0	New Look	0
BhS	0	Next	0
Boots the Chemists	1	River Island	0
Burton	0	Sainsbury's	0
Carphone Warehouse	0	Superdrug	0
Clarks	0	Tesco	0
Clintons	0	Topman	0
Currys	0	Topshop	0
Debenhams	0	Virgin Megastore	0
Dorothy Perkins	0	Vodafone	0
HMV	0	WH Smith	0
H&M	0	Waitrose	0
House of Fraser	0	Waterstones	0
John Lewis	0	Wilkinsons	0
Marks & Spencer	0	Woolworths	1

Source: Experian GOAD, CBRE Centre Survey 2007
NB: Since conducting the health checks, Woolworth stores have ceased trading.

2.42 There are only a few well known national multiple in Lyme Regis; Boots the Chemist and Woolworths, which has ceased trading since the health checks were conducted. It should be recognised however that other key retailers listed above are unlikely to favour this location, as the shopping population is probably below their store criteria threshold. There are however several other multiple traders, such as Threshers off-licence and several well known banks HSBC, Lloyds and Nat West.

2.43 Although overall there is a low multiple retailer provision, the centre offers a diverse range of independent retailers. This adds considerable character and differentiates the town from its competitors, and given Lyme Regis' dual shopping/leisure role this fits comfortably with its status.

Retailer Demand

2.44 Five retailers have registered with Focus requiring in total a maximum of 25,500 sq ft (2,322 sqm). Three of these were well known national restaurants; Ask, Pizza Express and Zizzi. All three of these restaurants are seeking units of between 2500-5000 sq ft (232-464 sqm) although such units are in short supply in the town.

2.45 Two comparison retailers are also seeking space in Lyme Regis; Superdrug and Trespass. Trespass, an outdoor clothing specialist, indicates the value the centre has to the leisure market.

2.46 The level of demand for Lyme Regis is reasonable, with the emphasis on the leisure market. This suggests a fairly healthy centre, albeit strongly dependent on tourism.

Shopping Rents

2.47 The prime retail rental values in Lyme Regis are around £23 per sq ft Zone A (VOA 2007). This rental tone is commensurate with smaller centres, although at this level achieving viable retail development would be challenging.

Commercial Yields

2.48 There is no readily available information on commercial yields within Lyme Regis. From our experience, however, we would expect a prime unit let to a good tenant to achieve in the order of 7%. This is consistent with other towns of a similar size and status to Lyme Regis.

Vacant Property

2.49 The number and extent of vacant property in the centre is a good indicator of demand for premises. In turn, it helps to indicate the vitality of the destination. From visiting Lyme Regis three vacant units were identified which equates to just 2.8% of the available stock. This is far lower than the UK average of 10.9%. All three of the units were to the north of the town in the secondary location of Silver Street. It should also be noted that all three of the identified vacant units appear to be fairly small in size. This may be contributing to there being few UK multiple retailers within the town. Should opportunities arise to create larger units (such as merging two vacant units) then this may assist in attracting such occupiers.

Pedestrian Flows

2.50 Lyme Regis has a fairly good pedestrian flow, particularly around the seafront area, and leading up Broad Street – the prime retail street. Pedestrian flows along Coombe Street, Church Street, Silver Street and Pound Street are much weaker. Even so, and in light of the fairly small scale of the centre, the pedestrian flows are good, and are considerably stronger during holiday periods.

Accessibility

2.51 By road the town is served by the A3053 which runs through the town off the A35 and leads west along the coast. The road access is particularly narrow through Church Street to Bridge Street up to Broad Street resulting in an often congested town centre.

2.52 There are no rail links to Lyme Regis. Bus services stop in Lyme Regis and provide connections to the surrounding area.

2.53 With regard to parking, a large park and ride operates at the edge of the town. Smaller car parks are dotted in and around the edge of the town. There is limited short stay on street parking along the main thoroughfare.

2.54 Pedestrian access is well served. The network of streets together with a number of public footpaths lead to the town from the car parks. Pavements are however often narrow, albeit a physical result of the town's location on a steep hillside.

Environmental Quality

2.55 Within Lyme Regis we undertook an environmental management audit of the centre. This involved giving a score, 1 to 5, with 1 being 'very poor' and 5 being 'excellent' to a number of different environmental criteria.

2.56 The scoring system is conducted for the centre and the aggregated results are set out below:

State of Lyme Regis Town Centre Environment

Summary	Average Score
Condition of carriageway [loose, broken, missing, uneven, temporary, obstructions]	4
Seats/planters/hanging baskets/litter bins [paintwork, broken, uneven, parts missing, not working, badly sited, not present]	5
Public facilities, telephones, bus stops/shelters [condition]	3
Graffiti, fly-posting, vandalism	4
Market stalls and street traders [tidiness, waste disposal, appropriateness to street]	n/a
Barriers to movement [servicing, general traffic, lack of safe crossing facilities etc.]	2
Cycle parking [formal or informal, availability, capacity]	3
Maintenance and repair of buildings, shopfronts and canopies	5
Personal security and police presence	4
Wheelchairs access and facilities for the blind or partially sighted	3
Average Total	3.6

Source: CB Richard Ellis (2007)

2.57 Lyme Regis has benefited from the tourist attraction of the seaside town. There is good quality seating and hanging baskets along with litter bins in the main areas around the marine parade. The built form and natural environment and views of the sea create an attractive setting. The main problem arises from the tight road access points which create a pinch point for traffic at Bridge Street and Cobbs Gate. The bend in the road also offers limited visibility and traffic and pedestrians may conflict at this point. The narrow road also leads to limited space for footpaths which whilst creating a character to the area, also creates difficulties for pedestrians. Overall the town therefore achieves a score of 3.6.

Perception of Safety and Crime

2.58 Overall the centre appears to offer a fairly safe and secure retailing environment, at least during daytime hours and there appears to be adequate street lighting to create the sense of a safe place during the hours of darkness. There are also a number of dwellings integrated throughout the centre which assist with self policing of the centre.

Out of Centre Retail Provision

2.59 There are no out of centre retail developments near to Lyme Regis.

Potential of the Centre to Grow

2.60 Centres which have flexibility to change and evolve to meet retailing requirement trends, tend to be healthier. Otherwise the centres tend to stagnate. In the case of Lyme Regis opportunities to extend the retail offer are very limited, reflecting the highly constrained nature of the centre. Increases in retail space in Lyme Regis town centre are likely to be achieved through the re-use of vacant premises or upper floors, or possibly small scale development of service yards/back lands. A description of the potential sites available in the centre is included in Section 4.

Summary

2.61 Lyme Regis is a fairly healthy centre, albeit that much of its success rests on tourism. A number of factors contribute to its health; a reasonable diversity of uses, a good representation of comparison retailers and a fairly accessible location. Convenience retailers are also well represented. The key attraction is the seaside setting and built form. Looking forward there are a number of initiatives that could help the centre improve further. This could include ensuring the centre is as attractive as possible to retailers in terms of available stock. It should however be noted that the scope to extend Lyme Regis' retail offer is very limited, and only likely to be incremental and small scale in nature.

Beaminster

2.62 Beaminster is a compact and small town centre clustered around a central square. The centre is essentially split in half by the A3066. There is a mix of more traditional convenience foodstores such as butchers, delis along with a few bars and cafes and some comparison outlets. The primary role of the centre is to serve the shorter term convenience needs of local residents and passing trade.

Key Health Check Indicators

Diversity of Main Town Centre Uses

2.63 A total of 28 retailers were recorded on the site visit to Beaminster. There is a fairly diverse mix of uses with a broadly equal level of comparison retailers and service occupiers. There are 7 convenience retailers, 11 comparison retailers and 10 service retailers.

Retail and Services Provision in Beaminster by Number of Units

Retail Category	No. of Units	% of Total	National Average %	Variance %
Convenience	7	24.1	9.1	15
Comparison	11	37.9	45.6	-7.7
Service	10	34.5	33.1	-1.4
Vacant	1	3.4	10.9	-7.5
TOTAL	29			

Source: GOAD Experian Report 2006; Update by CBRE Nov 2007

Note: Miscellaneous excluded

2.64 As would be expected for a small centre serving localised, short term needs, there is a good provision of convenience stores. These are also well integrated into the centre, and this is often acknowledged to be an important factor in underpinning the health of smaller centres.

2.65 In terms of other uses, the town offers a stock of residential dwellings, which are located in and around the central square and above shops. Office provision is extremely limited reflecting a weak demand for this use. Likewise, leisure provision is limited to the library, albeit that this level of provision is consistent with the small scale of the centre.

Retail Commitments

2.66 No significant existing retail planning commitments have been identified within Beaminster.

Retailer Representation

2.67 The HSBC Bank is the only national multiple located in the town. All the others units are occupied by independent stores generally offering higher quality goods and services.

Retailer Demand

2.68 Beaminster is not registered on the Focus or other requirement databases and therefore there is no data on retailer demand. In all likelihood, any demand for units in the centre is likely to arise from independent operator requirements.

Shopping Rents

2.69 The prime retail rental values in Beaminster are around £16.50per sq ft Zone A (VOA 2007). This fairly low rent reflects the small scale of the centre.

Commercial Yields

2.70 There is no information available on commercial yields within Beaminster, reflecting the small sizes of the centre and lack of any substantial investment market. Should a retail unit be available to purchase in the centre, we would expect it to achieve a yield in excess of 8%.

Vacant Retail Property

2.71 At the time of our survey (October 2007) there was one vacant unit noted within the town. Another unit is occupied but not used actively. Overall, this low vacancy level suggests a reasonably healthy centre, albeit smaller local centres tend to be far less robust than larger centres.

Pedestrian Flows

2.72 The main pedestrian flow is around the central square. However, the pedestrian flow in the centre is rather weak, even allowing for the small size of the centre.

Accessibility

2.73 The narrow pavements do not assist pedestrians moving easily around the centre, and the busy A3066 acts as a significant barrier to movement. Parking is also fairly limited, especially due to the lack of short stay on-street parking.

2.74 There are no railway connections in Beaminster although its connections by road are good. Overall, Beaminster only offers a reasonable degree of accessibility.

Environmental Quality

2.75 Within Beaminster we undertook an environmental management audit of the centre. This involved giving a score, 1 to 5, with 1 being 'very poor' and 5 being 'excellent' to a number of different environmental criteria. The scoring system is conducted for the centre and the aggregated results are set out below:

State of Beaminster's Town Centre Environment

Summary	Average Score
Condition of carriageway [loose, broken, missing, uneven, temporary, obstructions]	4
Seats/planters/hanging baskets/litter bins [paintwork, broken, uneven, parts missing, not working, badly sited, not present]	5
Public facilities, telephones, bus stops/shelters [condition]	4
Graffiti, fly-posting, vandalism	5
Market stalls and street traders [tidiness, waste disposal, appropriateness to street]	n/a
Barriers to movement [servicing, general traffic, lack of safe crossing facilities etc.]	2
Cycle parking [formal or informal, availability, capacity]	3
Maintenance and repair of buildings, shopfronts and canopies	5
Personal security and police presence	4
Wheelchairs access and facilities for the blind or partially sighted	2
Average Total	3.7

Source: CB Richard Ellis (2007)

2.76 The quality of the environment within Beaminster is considered to be of a good standard. All the buildings were well maintained. The shop fronts reflected the strong historic character and appearance and sympathetically designed. However, in places there are no defined pavements and this could result in safety concerns. The town achieved an overall score of 3.7.

Perception of Safety and Crime

2.77 From our site visit the High Street was a fairly safe retailing environment principally due to the busy road and mix of dwellings and uses facing onto the central area. This offers self policing to the area.

Out of Centre Retail Provision

2.78 There are no out of centre retail parks close to Beaminster.

Potential of the Centre to Grow

2.79 The historic nature of Beaminster, and its very tightly configured centre results in no suitable major sites identified to accommodate new retail development. Given the scale of the centre however, large retail development may not be appropriate (nor is there likely to be demand to support it). A more realistic strategy would be to promote the use of currently vacant or less active premises. An account of development options for Beaminster is set out in Section 4.

Summary

2.80 The health of Beaminster is reasonable; there is a good mix of uses, with a fairly healthy range of convenience providers. Additionally, there are few vacant units, and the character of the area is attractive and well maintained. The centre does not however offer particularly good access, and the pedestrian environment is somewhat challenging.

Sherborne

2.81 The main retail provision of Sherborne is located along Cheap Street, Long Street, South Street and Half Moon Street. The main centre itself is fairly elongated with the prime retail pitch stretching southward and downhill along Cheap Street. The historic quality of Sherborne is a striking characteristic, and creates a strong sense of place. This feeling is reinforced by many historic buildings situated just off the main retail parade, such as Sherborne Abbey and School. The historic attraction of the centre has resulted in Sherborne meeting both the needs of local residents (and arguably for longer term comparison needs) as well as the significant influx of visitors to the centre.

Key Health Check Indicators

Diversity of Main Town Centre Uses

2.82 A total of 122 retailers were recorded on the site visit to Sherbone, the retail mix of which is shown below.

Retail and Services Provision in Sherborne by Number of Units

Retail Category	No. of Units	% of Total	National Average %	Variance %
Convenience	18	14.8	9.1	5.7
Comparison	81	66.4	45.6	20.8
Service	23	18.9	33.1	7.
Vacant	0	0	10.9	0
TOTAL	122			

Source: GOAD Experian Report 2006; Update by CBRE Nov 2007

Note: Miscellaneous excluded

2.83 More than half of the shops within the town are occupied by comparison retailers, a number of these are also independent stores. Many of these are antique stores and jewellers, as well as more fashion orientated outlets. Overall the centre has a very strong representation of non food outlets, and especially higher quality fashion retailers. This suggests Sherborne is a healthy centre serving affluent residents and tourists alike.

2.84 Around 18% of the town's shops offer services, a considerable number of which are estate agents and banks. There are also a reasonable number of restaurants and bars especially to the south of the town. Almost 15% of the town is represented by convenience retailers; the main convenience retailer in the town centre is Somerfield. Sainsbury is located on the edge of the centre but is not integrated into the town's main retail offer, nor visible from the centre itself. In general, it is considered that the town comprises a good mix of retailers, although an increased convenience provision would better meet local residents' needs.

Retail Commitments

2.85 There are no significant existing retail commitments identified in Sherborne.

Retailer Representation

2.86 The table below identifies 'key' multiple retailers in Sherborne as defined by Goad Experian. These retailers are acknowledged to be important in attracting shoppers.

Key Attractors in Sherborne Town Centre

Key Retailer	No.	Key Retailer	No.
Argos	0	New Look	1
BhS	0	Next	0
Boots the Chemists	1	River Island	0
Burton	0	Sainsbury's	0
Carphone Warehouse	0	Superdrug	0
Clarks	0	Tesco	0
Clintons	0	Topman	0
Currys	0	Topshop	0
Debenhams	0	Virgin Megastore	0
Dorothy Perkins	0	Vodafone	0
H&M	0	WH Smith	0
HMV	0	Waitrose	0
House of Fraser	0	Waterstones	0
John Lewis	0	Wilkinsons	0
Marks & Spencer	0	Woolworths	1

Source: Experian GOAD, CBRE Centre Survey 2007
NB: Since conducting the health checks, Woolworth stores have ceased trading.

2.87 Sherborne contains a very strong mix of high end retailers such as Viyella, CC, Rohan Travel Clothes, Fat Face, Ocean and Earth and Basler. A number of these are well known national retailers, albeit only three of them however are acknowledged by GOAD as 'key' multiple retailers. The strong high quality retail profile – and historical environment – are key attractors themselves.

2.88 There are no commercial leisure uses of note in Sherborne town centre. The lack of commercial leisure offer is however more than compensated by the range of historical and cultural sightseeing attractions at the edge of the town centre. Indeed, large scale leisure uses may well be inappropriate, given the fine urban grain offered by Sherborne.

2.89 There is also a good level of residential stock in the town centre and on its fringes, which helps to create a vibrant mixed use centre. We are also aware that demand for housing in Sherborne is strong.

2.90 Although there are some small offices in the centre (for example, along Digby Road), overall stock is limited. This reflects the weak demand for this use in the centre.

Shopping Rents

2.91 The prime retail rental values in Sherborne are around £25 per sq ft Zone A (VOA 2007). These results are commensurate with smaller centres, although at this level achieving viable retail development may be challenging.

Commercial Yields

2.92 According to the Valuation Office Property Market Report (July 2007) yields within Sherborne were about 6.50% in July 2007. This is a fairly good yield, suggesting a healthy centre and a reasonably active investment market.

Vacant Property

2.93 There were no noted vacant units within the centre of the town. Again, this confirms that Sherborne is a strong, vibrant town centre with good demand for premises. The lack of units may however constrain growth of the centre.

Retailer Demand

2.94 There are five retailer requirements lodged on the Focus databases (2007). Of these, four are from high order comparison retailers, with a strong emphasis on the leisure market (two requirements are from art galleries). A single requirement also exists from a restaurant chain. In total, the space required is a maximum of 27,000 sq ft (2,508 sqm). Overall, the level of identified demand is reasonable, although we suspect that there may be further requirements, as many high order retailers do not log their requirements on national databases.

Pedestrian Flows

2.95 The centre had a strong flow of pedestrians down the main retail street (Cheap Street), around the Somerfield store and along Abbey Street by the public houses. Pedestrian flows tail off at the southern end of Cheap Street and along South Street. Overall, the level of footfall demonstrates a healthy centre.

Accessibility

2.96 Sherborne is fairly accessible. The main A30 road runs east west from Yeovil to Cold Harbour. The B3145 runs north to Bristol and the A352 leads south to Dorchester, providing good access to car borne visitors.

2.97 Bus stops are located along the A30, although services do not penetrate the heart of the centre. Other bus stops are at Digby Road, on Greenhill, on Coldharbour, and in McCreery Road, on South Street outside Sainsbury's, and in South Avenue.

2.98 Overall, Sherborne is well served with several buses daily to Yeovil, Henstridge, Wincanton and (Mon – Sat) Gillingham and Shaftesbury, and Dorchester via Cerne Abbas, as well as many other routes serving outlying villages.

2.99 The town is served by a large main car park adjacent to Somerfield. Other smaller car parks are at the Old Market (short stay), Culverhayes (long stay) car park (also a coach park), in Acreman Street and at the railway station, as well as short-term on-street parking in Digby Road and St Swithin's Road. Based upon our site visit car parking provision appears well distributed around the centre and well used.

2.100 Sherborne is also on the main railway line between London Waterloo and Exeter. The station lies at the edge of the town centre. At the time of our centre visit, Cheap Street was pedestrianised. This significantly aids pedestrian movement in the centre.

Environmental Quality

2.101 Within Sherborne we undertook an environmental management audit of the centre. This involved giving a score, 1 to 5, with 1 being 'very poor' and 5 being 'excellent' to a number of different environmental criteria. The scoring system is conducted for the centre and the aggregated results are set out below:

State of Sherborne's Town Centre Environment

Summary	Average Score
Condition of carriageway [loose, broken, missing, uneven, temporary, obstructions]	4
Seats/planters/hanging baskets/litter bins [paintwork, broken, uneven, parts missing, not working, badly sited, not present]	5
Public facilities, telephones, bus stops/shelters [condition]	3
Graffiti, fly-posting, vandalism	5
Market stalls and street traders [tidiness, waste disposal, appropriateness to street]	n/a
Barriers to movement [servicing, general traffic, lack of safe crossing facilities etc.]	4
Cycle parking [formal or informal, availability, capacity]	3
Maintenance and repair of buildings, shopfronts and canopies	5
Personal security and police presence	4
Wheelchairs access and facilities for the blind or partially sighted	4
Average Total	4.1

Source: CB Richard Ellis 2007

2.102 Sherborne town centre's environment was of a high standard. The overall ambience of the centre is good, benefiting from the excellent quality of the built environment. Possibly, the town could benefit from creating/enhancing specific public realm focal points and perhaps encouraging further seating in appropriate locations (for example, the streetscape immediately to the south of the Abbey could become an area to relax and take in the sights). The town achieved a score of 4.1, a standard of 'very good'.

Perception of Safety and Crime

2.103 From our site visit, we consider that the perception of safety and crime in general was very good in Sherborne. The main street is fairly wide, and side streets are generally light and enticing.

Out of Centre Retail Provision

2.104 On the outskirts of Sherborne town centre at Ludbourne Road, there is a Sainsbury's supermarket (938 sqm net), operating as one of the major convenience goods retailers to the area. There is also a substantial garden centre at New Road, south-east of the town.

Potential of the Centre to Grow

2.105 Extending Sherborne's retail offer is challenging. Much of the retailing centre is hemmed in by historic buildings and, indeed, many of the retail outlets are listed. The only potential retail development site in the centre is the car park to the rear of Somerfield (adjacent to Swan Yard). This could offer scope to increase unit shopping in Sherborne, whilst creating strong links through to Cheap Street. The loss of parking may however need to be considered carefully, were this opportunity taken forward. This opportunity is discussed in more detail in Section 4.

Summary

2.106 Sherborne is a very attractive town centre which has a good mix of retail provision serving the needs of residents and visitors. There is a reasonable diversity of uses although an enhanced convenience provision might be better placed to meet local residents' needs. Even so, the strength of Sherborne as a retail destination is demonstrated by the lack of available units, reasonable demand, a fairly keen yield and the overall highly vibrant nature of the centre. What Sherborne must potentially grapple with in the future is how the retail offer of the centre can be extended without negatively impacting on the integrity of this historic location.

3

REASN MODEL FORECASTS

REASN MODEL FORECASTS

3.1 An important component of our Study is the preparation of up-to-date forecasts of capacity for additional retail floorspace in the catchment area (Appendix 1). Section 5 of the main report provides an explanation of the CB Richard Ellis REASN model and the approach we adopted to forecast retail capacity. In this section we detail the findings of the smaller West Dorset market towns of:-

- Bridport;
- Lyme Regis;
- Sherborne; and
- Beaminster.

3.2 The REASN Model tables are set out in Appendices 2 and 3. Table 1 defines the catchment area and sets out the population forecasts. Table 2a sets out growth in expenditure on convenience and comparison goods at each of the forecasting dates. Tables numbered with the suffix:

- 'c' apply to Bridport Town Centre;
- 'd' apply to Sherborne Town Centre;
- 'e' apply to Lyme Regis Town Centre; and
- 'f' apply to Beaminster town centre.

3.3 Thus, in the case of Bridport Town Centre, Table 3c sets out the market shares of available catchment area expenditure which are attracted from each zone to the Town Centre at each date, derived from the survey results set out in Tables 3c but with adjustments as descri9bed above. Table 4c indicates the expenditure attracted from each zone to Bridport town centre, and is the product of Tables 2 and 3c. The bottom line of Table 4c indicates the total expenditure attracted from the catchment area to the centre, and is carried forward into the top line of Table 5c. This is then compared with existing floorspace to forecast the capacity for additional retail floorspace.

3.4 In considering the amount of floorspace for the various centres we consider the likely level of expenditure capacity assuming population growth based upon the Census data (Scenario 1) but also if the recommended increased housing numbers, as identified by the RSS Panel Report, are realised (Scenario 2). The RSS Panel recommend that the area accommodates a further 280 dwellings per year in Weymouth and Portland Borough and a further 625 dwellings per year within West Dorset District. At this stage no detailed phasing has been agreed however it is expected that many of the smaller towns such as Bridport will need to accommodate further housing. To account for this we have allocated the housing on a ratio defined by the catchment zone population in order to provide a preliminary indication of the likely effects of increases in the population. The results have identified a marginal increase in floorspace over the plan period across all the towns.

3.5 We have also sought to apportion the capacity identified beyond the modelled centres based upon existing market shares. This is consistent with the approach employed in the Joint Town Centre Study (December 2008)

3.6 In arriving at the amount of floorspace that can be supported by the identified expenditure we have applied to convenience goods the average turnover of the top five foodstores. For comparison floorspace we have applied what we consider to be a realistic turnover for the individual centre.

Bridport Town Centre

Convenience Goods Shopping

3.7 The main convenience provision in Bridport is currently provided by the Co-op and Somerfield (however this has now recently been bought by Waitrose). Table 5c in Appendix 2 shows that the main food stores in Bridport town centre are estimated to be achieving sales of just over £13.1m in 2007. At this level, they are trading just below the level based on estimated company averages for each store (approximately £13.6m, Table 5c(i)). If the foodstores were to achieve company average turnover this would result in capacity for 42sqm net additional food store floorspace by 2012 increasing to 144 sqm net by 2017, 254sqm net by 2022 and 347sqm net by 2026 (Table 5c).

3.8 This indicates capacity for modest additional food store floor space in the town centre on the assumption that there is no change in market shares of catchment area convenience goods expenditure attracted by the town centre.

3.9 Under Scenario 2 capacity would increase to 56 sqm net in 2012, rising to 159 sqm net by 2017, 270 sqm net by 2022 and 363 sqm net by 2026.

3.10 However we consider that the overall capacity for additional foodstore floorspace over the Plan period will be taken up by extensions to existing food stores i.e. Somerfield.

Comparison Goods Shopping

3.11 Table 5c (Appendix 2) shows that Bridport town centre is estimated to be achieving comparison goods sales of approximately £35.7m in 2007. This results in a base year sales density of £2,955 per sqm net. It is however noteworthy that since conducting the health checks, the Woolworth store has ceased trading and currently remains vacant in the town centre.

3.12 Overall, we conclude that the comparison goods shops in Bridport town centre as a whole are trading moderately well, compared with other town centres of similar size and nature. There is no evidence of substantial under performance.

Neither is the town centre as a whole trading at an excessively high level. We therefore consider that the estimated sales level in the town centre in 2007 represent a realistic 'equilibrium' position on which to base forecasts of future retail capacity.

3.13 Table 5c shows that based on the existing retail provision, there will be sufficient expenditure growth in the catchment area to support additional comparison goods retail floorspace of approximately 1,393sqm net by 2012, increasing to 4,596sqm net by 2017, 8534sqm net by 2022, and 11,945sqm net by 2026, if forecast growth in per capita expenditure occurs.

3.14 Under Scenario 2 capacity would increase to 1,571 sqm net in 2012, rising to 4,807 sqm net by 2017, 8,782 sqm net by 2022 and 12,224sqm net by 2026.

Lyme Regis Town Centre

Convenience Goods Shopping

3.15 In terms of Lyme Regis town centre convenience capacity, (Table 5d Appendix 2) the main foodstores in Lyme Regis town centre, represented mainly by the town's Co-op store on Broad Street, are expected to achieve sales of just over £1.5m in 2007. At this level, they are trading above the level based on estimated company averages for each store (approximately £0.8m).

3.16 If however all the existing main foodstores were to have their sales densities reduced to the estimated company average levels, this would create sufficient expenditure to support approximately 61sqm net additional foodstore floorspace by 2012, 73sqm net by 2017, 86sqm net by 2022, and 97sqm net by 2026 if forecast growth in per capita expenditure occurs.

3.17 Under Scenario 2 capacity would increase to 63 sqm net in 2012, rising to 75sqm net by 2017, 88 sqm net by 2022 and 99sqm net by 2026.

Comparison Goods Shopping

3.18 In terms of comparison goods (Table 5d Appendix 2) Lyme Regis town centre is estimated to be achieving comparison goods sales of approximately £13.4m in 2007. This results in a base year sales density of £3,297 per sqm net.

3.19 Based on the existing provision of stores and by maintaining a constant market share, there will be sufficient expenditure growth in the catchment area to support moderate additional comparison goods retail floorspace over the Plan period. This could support 986sqm net by 2012, 2,179sqm net by 2017, 3,645sqm net by 2022, and 4,914sqm net by 2026 if forecast growth in per capita expenditure occurs.

3.20 Under Scenario 2 capacity would increase to 1,052 sqm net in 2012, rising to

2,258 sqm net by 2017, 3,737 sqm net by 2022 and 5,018 sqm net by 2026.

Sherborne Town Centre

Convenience Goods Shopping

3.21 Table 5e (Appendix 2) shows that the convenience stores in Sherborne town centre, represented mainly by the town's Somerfield, are estimated to be achieving sales of just over £19m in 2007. At this level, they are trading significantly above estimated company averages (approximately £6.2m). If all the existing main foodstores were to have their sales densities reduced to the estimated company average levels, this would create sufficient expenditure to support approximately 1,118sqm net additional convenience floorspace by 2012 increasing to 1,236sqm net by 2017, 1,361sqm net by 2022 and 1,467sqm net by 2026. This level of capacity will need to be carefully considered in light of the Council's aspirations for the centre.

3.22 Under Scenario 2 capacity would increase to 1,140 sqm net in 2012, rising to 21,258 sqm net by 2017, 1,384 sqm net by 2022 and 1,491 sqm net by 2026.

Comparison Goods Shopping

3.23 Table 5e (Appendix 2) shows that Sherborne town centre is estimated to be achieving comparison goods sales of approximately £21.6m in 2007. This results in a base year sales density of £2,798 per sqm net.

3.24 By maintaining a constant market share based on the existing provision of stores, there will be sufficient expenditure growth in the catchment area to support considerable additional comparison goods retail floorspace over the Plan period. This could provide approximately 313sqm net in 2012 increasing to 2,050sqm net in 2017, 4,157sqm net by 2022, and 5,953sqm net in 2026, if forecast growth in per capita expenditure occurs.

3.25 Under Scenario 2 capacity would increase to 421 sqm net in 2012, rising to 2,177 sqm net by 2017, 4,307 sqm net by 2022 and 6,122 sqm net by 2026.

Beaminster Town Centre

Convenience Goods Shopping

3.26 Table 5f (Appendix 2) identifies that the foodstores in Beaminster town centre, represented mainly by the town's Co-op store, are currently turning over at £1.8m resulting in a turnover of £11,692 per sqm net. At 6this level, they are trading slightly above the level based on estimated company averages for the stores (approximately £0.8m).

3.27 If however the existing foodstores were to have their sales densities reduced to the estimated company average levels, this would create sufficient expenditure to support approximately 87sqm net additional foodstore floorspace by 2012, increasing to 98sqm net by 2017, 109sqm net by 2022 and 118sqm net by 2026.

3.28 Under Scenario 2 capacity would increase to 90 sqm net in 2012, rising to 100 sqm net by 2017, 111 sqm net by 2022 and 121sqm net by 2026.

3.29 We would expect this capacity to be taken up by extension to existing stores reuse of vacant units or the provision of further small units

Comparison Goods Shopping

3.30 Table 5f (Appendix 2) shows that Beaminster town centre is estimated to be achieving comparison goods sales of approximately £2.8m in 2007. This results in a base year sales density of £3,458 per sqm net.

3.31 The comparison units in Beaminster are all of high order and are trading well with no evidence of substantial under performance. We consider that the estimated sales level in the centre in 2007 represents a realistic 'equilibrium' position on which to base forecasts of future retail capacity.

3.32 By maintaining a constant market share, there will be sufficient expenditure growth in the catchment area to support moderate additional comparison goods retail floorspace over the Plan period. This could provide approximately 223sqm net in 2012, increasing to 438sqm net 2017, 697sqm net by 2022 and to 917sqm net in 2026 if forecast growth in per capita expenditure occurs.

3.33 Under Scenario 2 capacity would increase to 237 sqm net in 2012, rising to 454 sqm net by 2017, 717sqm net by 2022 and 939 sqm net by 2026.

3.34 In summary, as demonstrated in Appendices 2 and 3, the following capacity exists to 2026.

Table 3.1 Scenario 1 - Capacity for additional Retail Floorspace at 2026

Centre	Convenience (sqm net)	Comparison (sqm net)
Bridport	347	11,945
Lyme Regis	97	4,914
Sherborne	1,467	5,953
Beaminster	118	917

Source: Retail capacity tables Appendix 2

Table 3.2 Scenario 2 - Capacity for additional Retail Floorspace at 2026

Centre	Convenience (sqm net)	Comparison (sqm net)
Bridport	363	12,224
Lyme Regis	99	5,018
Sherborne	1,491	6,122
Beaminster	121	939

Source: Retail capacity tables Appendix 3

3.35 Tables 3.1 and 3.2 above illustrate that capacity exists for additional floorspace in the centre identified, albeit limited in terms of convenience provision in Lyme Regis and Beaminster. However this makes no allowance for the 'claw back' of capacity currently identified in free standing foodstores and retail warehouses outside of the centres.

3.36 A considerable amount of floorspace exists beyond the identified town centres of Weymouth, Dorchester, Bridport, Lyme Regis, Sherborne and Beaminster. We estimate there to be in the region of 10,805 sqm net convenience floorspace and 19,661sqm net comparison floorspace (Joint Town Centre and Leisure Study 2008 Table 5g, Appendix 6) in free standing stores and retail parks. To ensure that our assessment of capacity across the catchment is robust, regard must be had to this floorspace, its trade draw on the catchment area and also its likely level of turnover.

3.37 It should also be noted that in terms of the levels of capacity identified within this 'non central area' such capacity should be directed to existing centres in the first instance. The identification of capacity in these areas in no way endorses additional floorspace beyond existing town centres. Where additional expenditure is identified which cannot be accommodated within existing town centres PPS6 is clear that local planning authorities should consider extending their town centre boundaries to accommodate this capacity and consider edge-of-centre locations. Only where this is not possible should consideration be given to out of centre retail locations.

Reallocation of non central capacity

3.38 By allowing for the non central convenience capacity to be distributed based upon the current market shares of the centre, the capacity identified within Bridport town centre could increase under Scenario 2 to 205sqm net by 2012, increasing to 368sqm net by 2017, 543sqm net by 2022, and 690sqm net by 2026 forecast growth in per capita expenditure occurs.

3.39 Similarly comparison capacity could increase to 1,889sqm net by 2012, increasing to 5,673sqm net by 2017, 10,315sqm net by 2022, and 14,329sqm net by 2026 forecast growth in per capita expenditure occurs.

3.40 Lyme Regis' convenience capacity would increase to 80sqm net by 2012, increasing to 99sqm net by 2017, 119sqm net by 2022, and 136sqm net by 2026 forecast growth in per capita expenditure occurs. Comparison capacity would also increase to 1,172sqm net by 2012, increasing to 2,583sqm net by 2017, 4,313sqm net by 2022, and 5,808sqm net by 2026 forecast growth in per capita expenditure occurs.

3.41 Capacity for additional convenience floorspace in Sherborne would increase 1,358sqm net by 2012, increasing to 1,564sqm net by 2017, 1,784sqm net by 2022, and 1,970sqm net by 2026 forecast growth in per capita expenditure occurs. By allowing for the non central capacity to be distributed comparison capacity in Sherborne town centre would increase to 613sqm net by 2012, increasing to 2,700sqm net by 2017, 5,235sqm net by 2022, and 7,396sqm net by 2026 forecast growth in per capita expenditure occurs.

3.42 Finally, convenience capacity in Beaminster town centre would increase 114sqm net by 2012, increasing to 133sqm net by 2017, 153sqm net by 2022, and 170sqm net by 2026 forecast growth in per capita expenditure occurs. Comparison capacity would also increase to 262sqm net by 2012, increasing to 522sqm net by 2017, 837sqm net by 2022, and 1,104sqm net by 2026 forecast growth in per capita expenditure occurs.

3.43 In summary the following capacity exists by 2026.

Table 3.3 Scenario 2 - Capacity for additional Retail Floorspace at 2026

Centre	Convenience (sqm net)	Comparison (sqm net)
Bridport	690	14,329
Lyme Regis	136	5,808
Sherborne	1,970	7,396
Beaminster	170	1,104

3.44 Across all the towns there is capacity for additional convenience floorspace over the plan period. The amount allocated to each town depends on the location and accessibility of the existing provision and the existence of easily accessible foodstores beyond the town centres boundaries which draw trade from the centres. It is apparent particularly in the case of Sherborne but also Bridport that the 'claw back' from existing out of centre convenience store could take place if a suitable convenience store was provided within the town centres.

3.45 We conclude there will be capacity to support new comparison goods retail development in all the identified town centres over the forecast period. The challenge however is where this floorspace can be located to serve and enhance the existing draw of the towns. The town with the most significant need identified is Sherborne. This town in particular due to its historic character constrained development potential, will need to carefully assess sites that are brought forward. Other centres such as Bridport and Lyme Regis will need a 'step-change' in their retail offer including both quantitative and qualitative retail provision to attract increased market shares from across the catchment area.

3.46 Finally and in accordance with our usual practice, we must emphasise that all expenditure based forecasts of future shop floorspace capacity are based on imperfect data and contain a number of assumptions. Our forecasts set out in this study are based on the most up-to-date and reliable information available to us. They are intended to be exploratory rather than prescriptive; and as indications of the likely order of magnitude of future shop floorspace capacity (if forecast trends are realised), rather than as absolute statements of need or rigid limits to future growth. The shorter-term forecasts are likely to be more reliable than the longer-term forecasts.

3.47 All of the forecasts should be periodically revised as necessary in the light of actual population and expenditure growth, and the proposed new retail development in either town centre is completed and its effects become measurable. This would also enable the effects of any significant new developments in or improvements to competing retail destinations within the catchment area to be taken into account, when planning for further development. It should be remembered that our assessment is an explanatory test rather than a prescriptive mechanism.

3.48 The next section sets out the sequential approach to site selection.

4

SEQUENTIAL SITE ASSESSMENT

CBRE

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SEQUENTIAL SITE ASSESSMENT

4.1 PPS6 states that if there is no need for further retail development, there will be no need to identify additional sites for this purpose in the development plan. Whether or not there is a need for further retail floorspace within West Dorset market towns and their catchments is therefore an important issue for the new Local Development Frameworks (LDFs). In the event of need being established it will be necessary to identify sites to accommodate it in the revised plan.

4.2 In this section we undertake a review of potential development sites in Lyme Regis, Bridport, Beaminster and Sherborne. The aim of this site review is to examine the scope for development – and particularly retail development – in each of the centres. In doing so we discuss factors such as location, site size, opportunities and constraints for development and likely mix of uses, among others. We also briefly outline the key next delivery steps, the priority that should be afforded to each of the opportunities and the likely timescales involved.

The Sequential Approach to Site Selection

4.3 Our approach to reviewing sites follows the guidelines of PPS6. PPS6 advocates that the sequential test should be applied when determining the most appropriate location for retail development. This sequential test recommends that centre, then edge of centre sites should be considered in turn when planning for retail development.

4.4 Our site specific comments are also based on the outputs from the retail capacity exercise and the likely quantitative and qualitative need for future retail development in each of the centres. For each, the Scenario 2 capacity is used, although it should be recognised that this is the higher end of the capacity range. In addition, we also draw on our qualitative knowledge of the office and leisure market for each centre (as referred to in the health checks), given that these uses are also potentially subject to the sequential test. Finally, our site review is also set in the context of known occupier requirements. Location plans for each of the sites described below are attached at Appendix 3 of the Joint Town Centre Retail and Leisure Study (December 2008).

Bridport

4.5 Based upon Scenario 2 and the reallocation of non central need, convenience capacity exists in Bridport for 205 sqm at 2012, rising to 690 sqm by 2026. Comparison goods floorspace identified is 1,889 by 2012 and 14,329 sqm by 2026 (Table 3.3). In the short term, this convenience capacity doesn't warrant the allocation of a site specifically for this use. For comparison goods, the proposal at the bus station may soak up the short term need, although longer term sequentially preferable sites should be brought forward to accommodate this capacity.

Land at Rope Walk

4.6 Rope Walk, an area to the south of West Street, comprises surface car parking (c. 150 spaces), service yards and stores as well as other like industrial buildings/sheds and a car repair outlet. In total the core of the site extends to approximately 6500 Gross sqm. The site is of poor urban quality and has little to contribute to the wider offer of Bridport.

4.7 This town centre site is allocated in the Local Plan for car parking and mixed uses, including small retail units, leisure and business uses (policy WA4/WA5). The site also forms part of the Bridport South West Quadrant Regeneration Framework (2002). The framework does not however confirm the mix of uses that would be acceptable, although reference is made to retail, among other uses. The site is also subject to conservation area status, and a number of listed buildings lie close or adjacent to it. The site lies within and on the edge of the town centre.

4.8 Assembling the various land interests in this area would be the key to delivering this opportunity. Ideally, any development should seek to encompass not only the surface car park but also (the framework already indicates that the Council would be willing to use Compulsory Purchase if necessary) other land including the car repair outlet, industrial sheds as well as some of the under utilised stores and yards to the rear of West Street. Access to the site could be retained off Tannery Road, although accessibility to the site is a possible weakness in terms of its attractiveness for retail uses. Importantly, redevelopment of this site should ensure integration into the existing town centre retail offer as best as possible. This could be achieved by ensuring the link along The Tanyard is retained and enhanced. Likewise, the pedestrian link running to the east of the Somerfield supermarket should also be enhanced. Were there other opportunities to forge another suitable access route off West Street to the site then this should be investigated further. This may however be challenging, given that many of the buildings along West Street and South Street are listed.

4.9 In terms of potential uses then the site could offer a good opportunity for larger retail units, which there is reasonable demand for from occupiers to locate in Bridport. In accordance with the retail capacity assessments, this would be expected to be comparison goods led (although the town centre status of the site could allow both food and non-food floorspace. Ideally, creating a retail circuit which includes Rope Walk through the redevelopment of the site, this would enhance the retail offer of Bridport considerably and be expected to be far more attractive to potential occupiers.

4.10 To take this site forward the Council should begin to consider options for redevelopment of this area, building on the initial work set out in the Framework document. Initially, this should comprise feasibility and viability testing of options to confirm the suitable mix and disposition of uses. Assuming a successful outcome from this process, – then the Council would be the best placed party to bring forward any regeneration proposal for this site. This could however be in partnership with other regeneration agencies.

- Priority – High
- Timescale – Mid to long term

Tannery Road Bus Station

4.11 This site of approximately 9000 Gross sqm currently offers a very poor urban environment. The site comprises Bridport bus station, a bus depot, surface car parking as well as a number of unattractive retail units fronting Tannery Road. Good access to the site is gained off West Street. The predominance of low intensity uses at this site suggest that it may be a soft target for redevelopment.

4.12 The local plan allocates this site for mixed uses, including residential, employment and retail (policy WA3). The site itself is at an edge of centre location. Therefore, other sites may be considered to be more sequentially appropriate, although may not be so attractive to large scale retailers. The site is included in the South West Quadrant Framework (West Dorset District Council – 2002). The Framework does not however stipulate the preferred mix of uses for this site. The land also falls in a Conservation Area.

4.13 The key site constraints to delivering a scheme at this location will be to relocate the bus station and depot. Possibly, these facilities could be re-provided on the same site, albeit that this would reduce the scope for development considerably (we understand the Council is progressing a scheme which would re-provide the bus station at this site).

4.14 The site, including small retail units along Tannery Road (but excluding the bus depot) is owed by the Council. This could make delivery of this site more readily available. Flood risk from the River Brit – which flanks the western edge of the site – will also need to be assessed carefully.

4.15 Given the size and location of the site it could accommodate some retail uses; the extent will depend on the requirements of the bus station and the mix of the other uses proposed. A possible constraint on this site is the challenge of integrating any new retail into the town centre and that the area is of historical importance. Distances are considerable from this site to the core of the town centre, and arguably visibility of the site could be better.

4.16 We understand that the site is already subject to a planning application (excluding the bus depot). These proposals include some retail floorspace. Assuming that this application is approved, only the bus depot would remain unaffected. Given the proposed layout of the scheme in relation to the bus depot, this remaining parcel of land is unlikely to be suitably located, or prove particularly attractive to retailers.

- Priority – Moderate
- Timescale – Mid to long term

Strategic Overview

4.17 Bridport benefits from two sites which offer good regeneration potential, and may be attractive propositions to the retail market. Arguably, the Rope Walk site has the best potential to integrate well with the existing retail offer. Here, we would expect that any retail proposals would be comparison led, given the scale of capacity identified for this sector. The Council would also be expected to assist in bringing forward this site as soon as reasonably practicable, if the retail capacity is to be met in a sequential preferable way. While each site could be considered in isolation, potentially far more benefit could be derived by considering the town centre as a whole. In that respect the Council could consider an Area Action Plan for the town centre which, in part, focuses on the potential regeneration benefits that each of these sites could provide. A more holistic approach would help the Council to understand how these opportunities could contribute to a wider vision for Bridport.

4.18 Above all, it would be expected that the Council (or other public sector regeneration body) take the lead in this process, with a view to marketing and disposing of the sites at the appropriate time through the prescribed procurement route.

Lyme Regis

4.19 Lyme Regis only has limited capacity for both comparison and convenience goods. For comparison goods 1,172 sqm is needed by 2012, rising to 5,808 sqm by 2026. Convenience goods capacity ranges from 80 sqm at 2012 to 136 sqm by 2026 (table 3.3). This low level of capacity suggests that specific site allocations are probably unnecessary.

4.20 The highly constrained nature of this destination also means that there are no significant retail development opportunities in Lyme Regis town centre. Nor have any suitable retail sites been identified at edge of centre locations. There are however a number of smaller opportunities to increase the retail offer in the town centre, and help develop Lyme Regis in an organic way as well as meeting the identified need. These opportunities are:

- Re-use of vacant units. There are a few vacant units within the town centre. Re-use of these units should be encouraged as best as possible. There are also a number of stores (for example on Coombe Street) and at Mill Lane which may offer opportunities for refurbishment/redevelopment to provide additional retail floorspace.
- Re-development of service areas and car parks – A number of opportunity plots comprising car parks and small service yards could be used for retail purposes. Examples of this already occurring include around Mill Lane and the Town Mill development. A similar pattern of development has occurred at the access road to Broad Street Car Park. Other small scale opportunities could arise, for example on the service yard area adjacent to the cinema on

Pound Street. Likewise, it might be possible to use some of the car spaces both at Broad Street car park and the Royal Lion Hotel car park. However such schemes are likely to come forward on an ad hoc and private sector entrepreneurial basis, and most likely by local developers.

4.21 The other possible way that Lyme Regis could extend its retail offer in a sensitive fashion would be for existing shop owners to extend their current premises (including use of upper floors, where possible). Alternatively, offices occupying ground floor space (such as 63 Broad Street) could ideally be relocated to upper floors within the town centre, were it possible. Again, this would seek to free up additional retail floorspace as well as create more active frontages.

4.22 Were a major retail development promoted in Lyme Regis then it is possible that out of centre sites would need to be considered. Such applications would need to be considered on their individual merits and in light of the identified capacity. However, a number of car parks could be possible development opportunities if, say, there were suitable demand from a foodstore operator or other large scale retailers. In that respect the Council may wish to consider whether car parks at Pound Street, Hill Road or Charmouth Road could be suitable for this purpose.

4.23 Careful consideration would need to be given to the setting of any new retail development in the town or out of centre locations. Due consideration of highways/traffic issues arising from such a proposal would also be a critical issue. It should however be noted that while there is reasonable demand for retail premises in Lyme Regis (and especially from A3 occupiers) there is limited capacity identified. Therefore, a very strong case would need to be made for large scale proposals.

Beaminster

4.24 Beaminster only has 111 sqm for convenience floorspace identified by 2012, and 170 sqm by 2026. Comparison goods floorspace capacity is 262 sqm by 2012, rising to 1,104 sqm by 2026. This low level of capacity does not warrent the allocation of retail sites.

4.25 The tightly knit urban fabric of Beaminster means that there are no significant development opportunities for retail purposes in the centre. Similarly, there is a lack of suitable retail development opportunities at edge of centre locations. Given the small scale of Beaminster centre – and the weak retailer demand profile – it is however unlikely that a major retail proposal will come forward for the foreseeable future. Indeed, a more suitable strategy for Beaminster would be for the re-use of the few existing vacant outlets before consideration is given to any additional proposals. Were any significant retail developments proposed for Beaminster then these would need to be considered on their individual merits if they were proposed at edge of centre or out of centre locations, and especially in terms of their impact on existing traders and the retail capacity identified.

Sherborne

4.26 The retail capacity assessment identifies the need for convenience floorspace of 1,358 sqm by 2021 rising to 1,970 sqm by 2026. For comparison floorspace, the need is identified to be 613 sqm by 2012, rising to 7,396 sqm by 2026. While in the short term, retail capacity is fairly low, and therefore does not warrant a specific site allocation, the longer term prospects are that the need will increase considerably and the Council will need to consider how best to accommodate this growth in a sequentially appropriate way. This is particularly the case for Sherborne, where there is a very low shop unit vacancy rate, and therefore little potential to enhance its retail offer at present. The capacity figures show that this additional floorspace will be most needed to meet comparison goods needs, although there is longer term capacity to support a small foodstore. Newlands Car Park could take up some of this capacity, both for comparison and convenience goods, and assuming all the identified need is directed toward Sherborne town centre.

Newland Car Park

4.27 This site of approximately 5,200 Gross sqm lies east of Sherborne's main retail street – Cheap Street – and operates as the town centre's main car parking area. It also represents Sherborne town centre's only significant potential retail development opportunity, and has the potential to integrate well with the existing retail on Cheap Street, subject to suitable design.

4.28 This predominately edge of centre site is allocated in the West Dorset Local Plan (2006) for mixed uses (Policy NA4). We understand that the key aim of this allocation is to enable the repair and protection of Sherborne House, a listed building. Interestingly, this policy does not specify that retail uses would be preferred for this site (with the exception of Use Class A2). Retail provision at this location would serve to strengthen the town centre offer. Otherwise, it is possible that retail proposals would come forward for out of centre locations and threaten town centre trade. Clearly, however, any development here would need to avoid any harmful impact on the setting of the listed building.

4.29 Potentially, the site could accommodate a number of small and medium sized retail units, and be attractive not only to fashion led occupiers but also cafes, bars and restaurateurs who would benefit from Sherborne's strong visitor trade draw.

4.30 The ability to link any scheme at Newland car park with Cheap Street (through the pedestrian walkways of Swan Yard) and adjacent to the Somerfield foodstore could create an attractive retail circuit. It would also be envisaged that on upper floors above retail units there would be scope for residential and perhaps some limited office space, the latter use depending on the extent of demand.

4.31 As a next step the Council should investigate in more detail the potential constraints and opportunities provided by this site. In particular, regard should be had to the impact on any listed buildings any land assembly issues, and especially any rights of way/easements/servicing arrangements that could exist. Equally, any potential loss of car parking that resulted through redevelopment would need to be considered carefully. Assuming these constraints can be overcome then this land could make a significant contribution to the town centre offer of Sherborne.

- Priority – Moderate
- Timescale – Mid to long term

Strategic Overview

4.32 Given that our site visit has identified only one sequentially appropriate site then the Council should focus on this area as being the key location for future extensions to the town centre. If proposals come forward for major retail uses (such as large food stores or bulky goods operators) then alternative locations will need to be considered. In our view, and in light of the identified capacity we would anticipate that this is comparison retail led. It should be noted however that a small foodstore could contribute to the mix, subject to suitable design. Potentially, this might include considering land at Barton Farm at the western periphery of the town, as currently described under planning policy NA1 (West Dorset Local Plan 2006).

5

CONCLUSION

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Bridport

5.1 Situated to the south west of the district, Bridport operates as a fairly healthy centre. Key findings of the health check identified that the town comprises a national average representation of uses. In fact the town offered an above average representation of comparison goods retailers and a below average number of vacant units, both features of a healthy town.

5.2 There are, however a limited number of national multiples in the centre and arguably this could be improved. Nevertheless independent stores add character to the centre and signify the local role the town plays to the area.

5.3 In terms of attracting national multiples, the town will need to bring forward sites and provide units with larger floor plates. While a healthy level of demand has been registered by companies to locate to the centre, the retailers' requirements again evidence the demand for larger units, requesting a total of between 1,500-44,000 gross ft^2 (139 gross sqm – 4,090sqm gross).

5.4 In terms of the retail forecast the REASN model identified capacity for a small convenience goods store, (690sqm net) by 2026. It is realistic to assume that this modest capacity is the result of the proximity of the out of centre Morrisions store situated within the out of town Retail Park, as this is likely to absorb the existing trade from the town centre.

5.5 The forecast identified a comparison goods floorspace of between 1,890sqm net in 2012 rising to about 14,329sqm net by 2026, suggesting that the areas growth will place demand for a larger range and provision of these goods.

5.6 It is likely that this capacity can be absorbed by sites identified in the town centre. The sequential assessment identified two possible sites appropriate for redevelopment namely Rope Walk and Tannery Road Bus Station. A planning application has been submitted for Tannery Road, as such its development opportunity may be decided prior to being included as a site within the LDF.

5.7 While Rope Walk is considered to have the best potential for development of the two sites, we advise that any future allocation should be based on a holistic approach, taking into account a vision and objectives for the town centre and considering the regeneration benefits of the potential sites.

Lyme Regis

5.8 The seaside town of Lyme Regis is an attractive place to visit. The health check identified that the centre operates well, however much of its success rests on tourism.

5.9 As a result the town's retail offer is limited and principally serves the tourist market. Nevertheless the small centre has a broadly average representation of retail categories and again similar to Bridport has a below average number of vacant units.

5.10 Again retailers are registering requirements to locate to the centre have identified demand for larger units, which are not common place in the centre at present. This ranges from 4,000 ft^2 – 10,500ft^2 gross (370sqm -975sqm gross)

5.11 In terms of the potential capacity of the town over the plan period, the forecast identified a limited amount of convenience floorspace (80sqm net in 2012 rising to 136sqm net by 2026). While there is no significant provision of convenience stores within the town this is again expected to be due to the attraction and draw of the Morrison's Supermarket at Asker Meadows Retail Park on the edge of Bridport. The forecast identified between 1,172sqm net to 5,808sqm net between 2012 and 2026.

5.12 To meet this level of need it is likely that areas of the town could be redeveloped to absorb the growth. However the sequential site test did not identify any major sites that would be suitable, but advised that vacant units and existing car parks could be redeveloped in order to extend the town and provide growth.

Beaminster

5.13 The town of Beaminster is an attractive historic town comprising a healthy representative of retailers. The centre operates primarily as a service centre and as a result has an above average provision of convenience food stores.

5.14 The centre is however constrained and the size of units are all fairly small. Nevertheless there is a fairly low number of vacant units within the centre and all of the units sell high order class of goods.

5.15 The retail capacity forecast identified between 114-170sqm net convenience floorspace over the plan period and between 262-1,104sqm net of comparison goods floorspace over the same period.

5.16 There are however no suitable sites for the centre to grow and in any case due to its size and role in the hierarchy of towns it is unlikely to meet the needs of national retailers and therefore demand to extend the centre for this purpose is unlikely.

Sherborne

5.17 Sherborne is an attractive town centre reinforced by well maintained historic buildings along the retail core. The centre offers a diverse range of goods principally serving a local need. Although a higher provision of convenience goods within the town would be encouraged, it is understood that this may not be realistic due to the large Sainsbury's on the edge of town.

5.18 There are no vacant units, but there is a good level of demand to locate in the town which signifies the strength of the town.

5.19 The capacity identified by the retail forecast identified between 1,358sqm – 1,970sqm net of convenience floorspace between 2012 and 2026 and of between 610sqm and 7,396sqm net of comparison goods floorspace. This level of capacity would not easily be absorbed within the town due to the number and size of the historic buildings.

5.20 It is critical to the town's success that a suitable site is brought forward and developed in a way which integrates effectively without harming the town's character.

5.21 The sequential assessment identified one suitable site at Newland car park which would provide just under half of this need. This is considered to be the site with the most potential to serve as a key location for future extension of the town.