Nathaniel Lichfield and Partners

Planning Design Economics

JOINT RETAIL ASSESSMENT

Christchurch Borough Council
East Dorset District Council
North Dorset District Council
Purbeck District Council

VOLUME 2: EAST DORSET

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CONTENTS

Appendices

GLOSSARY OF TERMS

Class A1	Commercial units classed as retail or shop uses within the Use Classes Order**.**
Class A1 Services	Non-retail uses classed as A1 within the Use Classes Order, such as hairdressers, travel agents and dry cleaners.
Class A2	Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.
Class A3/A4/A5	Commercial units classed as food or drink outlets, for example pubs, restaurants and takeaways, within the Use Classes Order.
Convenience Goods	Consumer goods purchased on a regular basis, including food and groceries and cleaning materials.
Comparison Goods	Durable goods such as clothing, household goods, furniture, DIY and electrical goods.
Experian	A data consultancy who are widely used for retail planning information.
EGI	Estates Gazette Interactive is a published source of information providing known retail and leisure operators' space requirements in towns across the country.
Goad Plans	Town centre plans prepared by Experian, which is based on occupier surveys of over 1,200 town centres across the country.
Gross floorspace	Total external floorspace including exterior walls**.**
Higher order comparison goods	Durable goods which tend to be high value, bought on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to travel further to purchase these items.
Lower order comparison goods	Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceutical and toiletries. Customers are less likely to travel long distances to purchase these items.
Market share Penetration rate	The proportion of total consumer expenditure within a given area taken by a particular town centre or shopping facility.
Multiple traders	National or regional *'chain store'* retailers.
Net floorspace	Retail floorspace devoted to the sale of goods, excluding storage space.
Zone A Rent	The annual rental charge per square foot for the first 20 foot depth of a shop unit, which is the most suitable measure for standardising and comparing rental levels

1.0 INTRODUCTION

The Study

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Christchurch, East Dorset, North Dorset and Purbeck Councils to prepare a joint town centre and retail study, including an assessment of the main town and district centres within the four local authority areas. This Volume 2 report relates to East Dorset District.

Content of the Report

1.2 The Study has been split into two volumes. This volume 2 report should be read along side the Volume 1 report, which includes the macro analysis covering all four authority areas. Volume 2 is split into four separate for each of authority.

1.3 Section 2.0 of Volume 1 provides an overview of the local planning policy context. Section 3.0 describes existing shopping facilities within East Dorset. Sections 4.0 to 7.0 sets out centre health checks for the main centres. Section 8.0 provides an audit of the local centres and other shopping areas. Section 9.0 examines potential development sites in the main centres. Section 10.0 sets out our recommendations and conclusions.

1.4 As part of the Study process a series of workshops were held across the study area where the key findings were presented and discussed with key stakeholders. The summaries of these discussions are contained in Appendix B.

2.0 LOCAL PLANNING POLICY CONTEXT

Introduction

2.1 The national and regional policy context is set out in Volume 1.

2.2 The Planning and Compulsory Purchase Act 2004 introduced legislation to replace local plans with local development frameworks (LDFs). Work on LDFs has started for all the Councils within the study area and are at various stages of progression. In September 2007, the Councils were required to seek agreement from the Government Office for the South West to 'save' individual policies within the Local Plan until such a time when they are replaced by each relevant LDF.

2.3 Policies within this local policy context section only include those which have been 'saved' since September 2007.

East Dorset Local Plan 2002

2.4 Policy SHDEV1 states that

> *The development of shops, service and office uses in Classes A1, A2 and A3 of the Use Classes Order 1987 will be permitted in the town centres defined on the Proposals Map. Uses within Class B1 will be permitted where they do not result in a detrimental impact on the environment, character or operation of the centres or on the amenities of nearby properties.*

2.5 Small scale shopping facilities will be permitted in residential areas within urban areas and rural village policy envelopes defined on the Proposals Map will be permitted where the facilities are designed to meet the needs of the immediate locality (Policy SHDEV6).

2.6 Policy SHDEV8 has been included within the Local Plan to ensure that there is minimal loss of facilities for small rural communities. The policy states that

> *In small rural communities, the Council will resist proposals which would result in the loss of shops, public houses or community facilities unless it can be clearly demonstrated that the uses are unviable or that there are adequate alternative facilities available locally.*

3.0 EXISTING SHOPPING FACILITIES

Convenience Shopping Provision

3.1 Table 3.1 sets out the main food stores within East Dorset and other convenience sales floorspace within small convenience shops. The largest food stores (over 1,000 sq m net) are concentrated in Ferndown, Verwood and Wimborne.

Table 3.1: Existing Convenience Food Shopping Provision in East Dorset

Town/Store	Net Sales Floorspace Sq M
Sainsbury's, Ferndown	2,993
Tesco, Ferndown	3,189
Lidl, Ferndown	1,150
Iceland, Ferndown Town Centre	500
Other town centre convenience, Ferndown	350
Morrisons, Verwood	2,001
One Stop, Verwood	200
Verwood Other	220
Somerfield, Crown Mead, Wimborne	1,310
Wimborne Other	765
Co-op, Station Road, West Moors	300
Tesco Express, West Moors	166
West Moors Other	200
Co-op, New Road, West Parley	248
Co-op, Wareham Road, Corfe Mullen	790
Co-op, The Parade, Corfe Mullen	308
Other local shops East Dorset	200
Total	**14,890**

Sources: Institute of Grocery Distribution, Goad and NLP Site Survey

Comparison Shopping Provision

3.2 Table 3.2 sets out the distribution of comparison floorspace within East Dorset. Wimborne and Ferndown are the largest centres in size in terms of comparison retail floorspace, and Verwood and West Moors are much smaller centres.

Table 3.2: Existing Comparison Food Shopping Provision in East Dorset

Location	**Floorspace Gross Sq M**	**Floorspace Net Sq M**
Ferndown comparison shops	9,474	6,158
Comparison in food stores, Ferndown	n/a	2,587
Verwood comparison shops	866	563
Comparison in food stores, Verwood	n/a	425
Wimborne comparison shops	10,081	6,553
Comparison in food stores, Wimborne	n/a	199
West Moors comparison shops	1,184	770
Comparison in food stores, West Moors	n/a	66
Other comparison in food stores, East Dorset	n/a	180
Other East Dorset	n/a	650
Total	**n/a**	**18,149**

Sources: Goad and NLP Site Survey

4.0 FERNDOWN TOWN CENTRE

Introduction

4.1 Ferndown is the largest settlement within the East Dorset District in terms of floorspace and is the centre of the largest urban area in the District. The town has good transport links due to its location adjacent to the A31 trunk road giving easy access to the rest of Dorset and the UK. Ferndown is a relatively new centre with much development occurring in the 1980s.

4.2 The key issues emerging from the household surveys and NLP's own town centre health check are outlined below.

Structure

4.3 The shopping area of Ferndown is concentrated along Ringwood Road and Victoria Road, with some shops located within the purpose built shopping areas of Penny's Walk and the Ferndown Centre.

4.4 Primary Retail Frontage is identified on the proposals map of the Local Plan (2002) along Penny's Walk, the Ferndown Centre and Nos. 38 – 56 Victoria Road (evens) and 51 – 53 Victoria Road (odds). No secondary frontage is identified. The prime retail pitch, with the highest concentration of national multiples, is located within this primary shopping area.

Mix of Uses

Type of Unit	**Number of Units**	**Proportion of Total Number of Units (%)**	
		Ferndown (%)	**GB Average (%)**
Comparison Retail	41	36.3	48.3
Convenience Retail	9	7.9	9.4
Services/Misc	60	53.1	31.6
Vacant/Under Construction	3	2.7	10.7
Total	**113**	**100**	**100**

4.5 The table above demonstrates that Ferndown has 113 ground floor non-residential units in total. As can be seen, the town has a relatively low proportion of comparison retail units (36.3%) compared with the GB average (48.3%). Conversely the proportion of service and miscellaneous uses substantially exceeds this average by 21.5%.

4.6 The vacancy rate however, is significantly below the national average at just 2.7% (3 units) and the units are not concentrated to one location thereby indicating that the centre is relatively buoyant.

4.7 The Centre has a very high proportion of service and miscellaneous uses for its size in particular banks and other financial services and estate agents. There are also quite a few takeaway and restaurant units within the centre although they are relatively evenly distributed throughout the centre with no noticeable concentrations and do not offer cause for concern.

Breakdown of Comparison Shops

Type of Unit	**Ferndown**		**GB**
	Number of Units	**%**	**Average (%)**
Clothing and Footwear	5	12.2	26
Furniture, carpets and Textiles	6	14.7	10
Booksellers, arts, craft and stationers	1	2.4	9
Electrical, games, music, photography	7	17.1	11
DIY, hardware and homewares	1	2.4	6
China, glass, gifts and fancy goods	3	7.3	4
Cars, motorcycles and motor accessories	1	2.4	3
Chemist, drugstore, opticians	6	14.7	8
Variety, Department and catalogue	0	0	2
Florists, nurserymen and seedsmen	2	4.9	2
Toys, hobby, cycle, sport	1	2.4	6
Jewellers	0	0	5
Other Comparison retailers	8	19.5	8
TOTAL	41	100	100

4.8 The above table shows that Ferndown does not follow the GB average in terms of the proportion of types of non-food goods sold. The proportion of clothing and footwear shops, booksellers, arts, crafts, stationers and jewellers are far below the national average in terms of proportion whereas there is an over provision of furniture, electrical, chemists and 'other' comparison retailers.

4.9 With regards to the topography of the town centre it is relatively flat. The majority of shopping units are conversions although there are some purpose built units most noticeably the units located within Penny's Walk and the Ferndown Centre. Overall, the retail units are considered to be quite large in size.

4.10 During NLP's visit to Ferndown the centre was relatively quiet other than around the Tesco store in terms of pedestrian flow.

4.11 The centre is not pedestrianised other than around Penny's Walk and the Ferndown Centre. This causes a major conflict between pedestrians and vehicles particularly given the high volume of traffic which flows along both Victoria and Ringwood Road where the majority of shops are concentrated.

4.12 Ferndown is accessed via strong road links from both the A31 and the A348. There is no rail link to the town and therefore bus is the only option available in terms of public transport provision.

Town Centre Audit

4.13 As part of the study each of the towns were audited based on 35 factors and awarded a score from 1 (being very poor) to 5 (being very good).

Trade Mix

4.14 As part of the study the primary shopping area was rated in terms of the proportion and quality of national multiple operators, specialist independent traders and uses associated with the evening economy (public houses, bars, restaurants and entertainment uses). The following table represents the scores awarded to Ferndown:

Performance Factor	Shopping Area Score
Proportion of special independent traders	3
Quality of special independent traders	2
Proportion of national multiple outlets	2
Quality of national multiple outlets	2
Presence of evening economy	3

4.15 The proportion of special independent traders within the town centre was considered to be 'neither good nor bad' although the quality of these traders was rated as 'quite poor'. This was largely due to the lack of variety and the number of shops offering 'discount' goods. The quality and proportion of national multiple retailers was also considered 'quite poor' with the only ones being Tesco, Iceland, Boots and Superdrug.

4.16 In terms of an evening economy Ferndown has the Barrington Theatre and Community Centre. This predominantly hosts classes for the community such as salsa dancing although concerts and plays are often on the agenda. There is also a restaurant and bar area within this small complex. In addition there are two pubs, two

Indian restaurants and several takeaways. Therefore the evening economy was rated as ‘neither good nor bad’ although there is clear scope for improvement.

Anti-Social Behaviour & Security

4.17 The performance of the town centre in relation to CCTV coverage, police presence, anti-social behaviour and street lighting as perceived during NLP’s visit was assessed.

Performance Factor	Shopping Area Score
Evidence of begging/on –street drinking	5
CCTV coverage/police presence	3
Frequency of street lighting	3

4.18 During NLP’s visit there was no evidence of begging, on-street drinking or any other anti-social behaviour and therefore this was awarded the highest rating of 5. However, it should be noted that there is anecdotal evidence of on-street drinking in the evenings in the car park of the Tesco store.

4.19 In terms of CCTV coverage, police presence and frequency of street lighting this was given a rating of 3 which is ‘neither good nor bad’. Overall it was considered that Ferndown offers a relatively strong perception of safety although there is potential to improve this further.

Accessibility & Movement

4.20 The influencing factors for accessibility and movement around the town centre were assessed by looking at pedestrian/vehicular conflict, frequency of pedestrian crossings and bus stop and car park locations.

Performance Factor	Shopping Area Score
Location and convenience of car parks	4
Pedestrian/vehicular conflict	3
Traffic congestion	3
Frequency of pedestrian crossings	3
Frequency of bus stops	3
Quality of bus stops/shelters	3

4.21 Movement in and around the centre of Ferndown is considered difficult due to the volume of traffic passing along Victoria Road and particularly Ringwood Road (A358). Both roads are heavily trafficked while providing few pedestrian crossings which is leading to a high pedestrian/vehicular conflict and is clearly something in need of improvement.

4.22 In terms of car park location this was given a rating of 4. The main car park for the town centre is a two storey structure adjacent to the Tesco store offering 800 free car parking spaces. The quality and quantity of bus stops located within the town centre was rated as 'neither good nor bad' and could therefore be improved.

Cleaning & Maintenance

4.23 Six factors were analysed for cleaning and maintenance as part of the NLP visit. The results are shown in the following table:

Performance Factor	Shopping Area Score
Litter and street cleaning	4
Gum on paving	4
Evidence of fly-posting	4
Evidence of graffiti	4
Maintenance of paving/street materials	4
Quality of shop frontages/fascia	2

4.24 Overall the cleanliness of Ferndown was quite good with limited evidence of litter, gum, fly-posting or graffiti. The maintenance of the street paving, particularly around the Ferndown centre was considered quite good with a score of 4. However, the quality of the shop fronts and fascias let the centre down by only scoring 2.

Quality of Streetscape & Environment

4.25 The quality of the streetscape and general shopping environment were analysed within Ferndown town centre based on twelve factors. The quality of the streetscape was rated as being reasonably low in standard with the majority of factors rated as 'neither good nor bad' or 'quite poor'. Therefore much can be done in order to improve this score. The only factor which was awarded a rating of 4 was the quantity of street signage.

Performance Factor	Shopping Area Score
Quality of paving/street materials	3
Quality of street furniture (bins and chairs)	2
Quantity of street furniture (bins and chairs)	3
Quality of Public Art	2
Quality of street signage/maps	3
Quantity of street signage/maps	4
Quality of design of street lighting	3
Quality/attractiveness of commercial properties (inc. upper floors)	3
Quality of planting/trees	2
Quantity of planting/trees	2
Quantity/Quality of town centre parks/public open space	2
Street entertainment/events/ liveliness	2

4.26 The general liveliness of the centre was rated as ‘quite poor’. There were a limited number of people in the town centre other than within the Tesco store thereby leaving the Victoria Road and Ringwood Road very quiet.

Property Vacancies

4.27 The number of vacant units within the town centre was low with only 3 units currently empty. These units were also dispersed through the town and did not appear as though they had been vacant for long periods of time. Therefore, high scores were awarded to reflect this.

Performance Factor	Shopping Area Score
Number of vacant units	4
Concentrations of vacant units	5
Derelict/long term vacant units	5

Summary

4.28 Overall the shopping area within Ferndown town centre is considered reasonable with the average score for the 35 factors totalling 3.1 (i.e. ‘neither good nor bad’). No factors were given a rating of 1 (very poor) although 10 factors were considered as ‘quite poor’ with a score of 2.

4.29 The main issue with Ferndown is the streetscape which is currently uninspiring in terms of its physical attractiveness and also combined with the lack of national multiples and poor quality of independent retailers is not drawing enough people into the town centre other than to the Tesco store.

4.30 However, there is much scope to improve these factors in order to make Ferndown a more vibrant and viable centre.

Business Occupiers Survey

4.31 The business occupier surveys are discussed in detail in Chapter 4. However, the key findings for Ferndown town centre (for which there was a 31% response rate) were as follows:

- The majority of businesses have been trading in the town for over 10 years (62%) or between 6 - 10 years (20%). No businesses had been trading for under one year;

- The majority of businesses are leased (90%) with only 7% of units owner-occupied;

- In terms of plans to change the business, 94% of respondents stated that they had no plans although 3% stated their intentions to close or relocate out of the centre;

- The current trading performance of Ferndown's businesses varied with 12% stating it was very good, 28% good, 35% satisfactory and 18% poor;

- When asked whether trading performance had improved over the past 2 years there was disagreement with 27% saying it had declined, 33% stating it had improved and 30% of respondents stating that it had stayed the same;

- The expected 12 month future trading performance was generally positive with 35% expecting improvement and 32% expecting it to stay the same. Only 10% were expecting a decline;

- The main factors which Ferndown businesses believe constrain their performance is high overheads (60%) and the economy in general (35%). The availability of car parking was also a concern for 33% of businesses and a lack of footfall/customers with 28% stating this respectively;

- The average score awarded to Ferndown town centre by businesses was 2.78 which is between neutral and poor with the lowest scoring factors being rates, liveliness/character and the range of shops and services;

- 30% of businesses within Ferndown have the opinion that it is too down market although the majority at 35% believe it is fine as it is;

- 45% of businesses believe there are not enough small independent shops where as 28% feel there are too many independent shops and not enough chain stores;

- The factors seen as the most important future planning issues by businesses were: increase range of national multiples/chain stores (50%), increase range of local/speciality retailers (55%), improve public car parking availability and cost (48%) and promote/publicise the attractions of the town centre (30%).

SWOT Analysis of Ferndown

4.32 The strategic recommendations for Ferndown are set out in Section 10, and a review of development opportunities in the centre is summarised in Appendix A. The SWOT Analysis of Ferndown below is based on NLP's audit of the centre, the household shopper survey results and discussions with Council officers and stakeholders.

Strengths	**Weaknesses**
• Low vacancy rate • Town centre supermarket • Accessible car parking	• Low quality public realm • Main traffic route through retail core • Lack of national multiple retailers • Low proportion of clothes shops • High overheads
Opportunities	**Threats**
• Environmental enhancements • Interest from national retailers	• Increased traffic through town • Potential for over concentration of takeaways at the northern end of Victoria Street • Proximity to Poole, Bournemouth and Castlepoint

5.0 VERWOOD TOWN CENTRE

Introduction

5.1 Verwood is located north of Ringwood and Ferndown and has good transport links to both via B3072 to Ferndown and to Ringwood via the B3081.

5.2 It is the third largest of the District's three 'main town centres', behind Ferndown and Wimborne Minster, and predominantly serves the local residents within Verwood and the surrounding area, including Romford. The key issues emerging from NLP's own town centre health checks and the household survey work is outlined below.

Structure

5.3 The shopping area of Verwood is concentrated along Station Road, Manor Road and Vicarage Road. No Principal or Secondary Retail Frontage is identified on the proposals map of the Local Plan (2002). There are no national multiple retailers located within the historic centre and no one area which could be considered to be the 'prime retail pitch'. The centre is fragmented. Additional shops and services are located around the Morrisons food store although this is detached from the main town centre.

Mix of Uses and Occupier Representation

5.4 The following table shows Verwood to have 37 ground floor non-residential units. When compared to the national average Verwood has a low proportion of comparison retail units, whilst conversely there is a high proportion of services and miscellaneous uses. The convenience provision is in line with the current national average. The vacancy rate is substantially below the national average with only one vacant unit.

Mix of uses

Type of Unit	**Number of Units**	**Proportion of Total Number of Units (%)**	
		Verwood (%)	**GB Average (%)**
Comparison Retail	9	24.3	48.3
Convenience Retail	2	5.4	9.4
Services/Misc	25	67.6	31.6
Vacant/Under Construction	1	2.7	10.7
Total	**37**	**100**	**100**

5.5 Verwood has a high number of service and miscellaneous uses for its size in particular hairdressers, beauty salons and a high volume of estate agencies. There are no restaurants or pubs within the town centre.

Breakdown of Comparison Shops

Type of Unit	Verwood		GB
	Number of Units	%	Average (%)
Clothing and Footwear	1	11	26
Furniture, carpets and Textiles	0	0	10
Booksellers, arts, craft and stationers	0	0	9
Electrical, games, music, photography	1	11	11
DIY, hardware and homewares	0	0	6
China, glass, gifts and fancy goods	1	11	4
Cars, motorcycles and motor accessories	0	0	3
Chemist, drugstore, opticians	1	11	8
Variety, Department and catalogue	0	0	2
Florists, nurserymen and seedsmen	2	22	2
Toys, hobby, cycle, sport	1	11	6
Jewellers	0	0	5
Other Comparison retailers	2	22	8
TOTAL	**9**	**100**	**100**

5.6 As can be seen from the above table Verwood is clearly not in line with the GB national average when it comes to the proportion of non-food retail goods sold. There is a distinct under provision in all areas apart from electrical, china and gifts, chemists, florists, toys and hobby and other comparison retailers where there is some over provision.

5.7 With regards to the topography of the centre it is relatively flat. The majority of the shopping units are conversions however the buildings are of a relatively modern design. Units within the town centre are all relatively small with One Stop Shop and Lloyds TSB occupying the largest units.

5.8 The centre is relatively accessible by road via the B3081 and B3072 and by bus. However, there is no rail link within this location.

Town Centre Audit

5.9 As part of the study each of the towns were audited based on 35 factors and awarded a score from 1 (being very poor) to 5 (being very good).

Trade Mix

5.10 As part of the study the primary shopping area was rated in terms of the proportion and quality of national multiple operators, specialist independent traders and uses associated with the evening economy (i.e. public houses, bars, restaurants and entertainment uses). The following table represents the scores awarded to Verwood:

Performance Factor	Shopping Area Score
Proportion of special independent traders	4
Quality of special independent traders	3
Proportion of national multiple outlets	1
Quality of national multiple outlets	1
Presence of evening economy	1

5.11 The proportion of special independent retailers was considered to be quite good although the quality of these retailers could be improved with a rating of 3. The only national multiple in the centre is the One Stop Shop and therefore the proportion and quality of national retailers was given the lowest rating of 1.

5.12 With regards to the presence of the evening economy this was also awarded a rating of 1 as there are no pub or restaurant units within the town centre. However, there was a Chinese takeaway.

Anti-Social Behaviour & Security

5.13 The town centre was also rated in relation to CCTV coverage, police presence, anti-social behaviour and street lighting during the NLP visit.

Performance Factor	Shopping Area Score
Evidence of begging/on –street drinking	5
CCTV coverage/police presence	2
Frequency of street lighting	4

5.14 During the NLP visit there was no evidence of on street begging or drinking and therefore this was awarded the highest rating of 5. Frequency of street lighting also rated highly at 4. CCTV coverage and police presence only got a rating of 2 which is ‘quite poor’. However, this could be largely because it is not required in this area.

Accessibility & Movement

5.15 The factors which influence accessibility and movement around the centre were considered i.e. pedestrian and vehicular conflict, frequency of pedestrian crossings and location and convenience of bus stops and car parks.

Performance Factor	Shopping Area Score
Location and convenience of car parks	5
Pedestrian/vehicular conflict	2
Traffic congestion	4
Frequency of pedestrian crossings	2
Frequency of bus stops	2
Quality of bus stops/shelters	3

5.16 Movement in and around Verwood is relatively easy, however, pedestrian/vehicular conflict was awarded a rating of 2 due to the fact that the B3081 runs through the centre with a steady stream of traffic although there was no visible congestion. The frequency of pedestrian crossings was also considered to be poor which therefore is something which could be improved.

5.17 The main car park was located behind the heritage centre and provides free car parking for visitors in a convenient part of the town. Car parking therefore received a rating of 'very good'.

5.18 The frequency of bus stops was considered 'quite poor' and the quality of the stops that were there were rated as being 'neither good nor bad'. Therefore this is something which should be considered if improvements to the centre are made.

Cleaning & Maintenance

5.19 NLP's analysis of cleanliness and maintenance of the town centre used six separate factors.

Performance Factor	Shopping Area Score
Litter and street cleaning	4
Gum on paving	5
Evidence of fly-posting	5
Evidence of graffiti	5
Maintenance of paving/street materials	3
Quality of shop frontages/fascia	3

5.20 The cleanliness and maintenance of Verwood rated very highly with very limited evidence of any litter, gum, fly-posting or Graffiti. However, the quality of the shop fronts and fascias and the maintenance of the paving materials were only rated as 'neither good nor bad'. Therefore, there is some room for improvement in this area.

Quality of Streetscape & Environment

5.21 The quality of the streetscape and general shopping environment of Verwood was assessed against 12 separate factors.

Performance Factor	Shopping Area Score
Quality of paving/street materials	3
Quality of street furniture (bins and chairs)	4
Quantity of street furniture (bins and chairs)	3
Quality of Public Art	2
Quality of street signage/maps	4
Quantity of street signage/maps	2
Quality of design of street lighting	3
Quality/attractiveness of commercial properties (inc. upper floors)	4
Quality of planting/trees	5
Quantity of planting/trees	5
Quantity/Quality of town centre parks/public open space	4
Street entertainment/events/ liveliness	2

5.22 The quality of the paving and lighting and quantity of street lighting has been rated as 'neither good nor bad'. However, the quality of the street furniture, signage, commercial properties and open space were all deemed 'quite good'. The quality and quantity of planting was also considered to be very good and as such was awarded a rating of 5.

5.23 However, the amount of street signage and public art was lacking in Verwood and as a result was rated as 'quite poor' therefore indicating that these areas should be improved upon in any future works. In addition, the centre was lacking vibrancy with few people in the town centre on the day of the NLP visit and therefore liveliness was also rated as 'quite poor'.

Property Vacancies

5.24 As noted previously, the vacancy rate in the town is very low with only one vacant unit. This unit is small and from its design it would only be suitable for a very limited number of businesses. Therefore, it is unsurprising that it is vacant and should not poorly reflect on to the town. Each of the factors relating to vacancies were given the maximum rating of 5.

Performance Factor	Shopping Area Score
Number of vacant units	5
Concentrations of vacant units	5
Derelict/long term vacant units	5

Summary

5.25 Overall the town centre shopping area of Verwood is considered to be quite good. The average score for the 35 factors totals 3.4 (i.e. between 'neither good nor bad' and 'quite good'). However, three factors were given the lowest rating of one which was namely the number and quality of national multiples and the presence of an evening economy.

5.26 However, consent was granted in 2006 for the demolition of April Cottage and erection of mixed use development comprising 5 shop units with residential above at the site positioned adjacent to the Heritage Centre. Therefore, it is likely that new retailers will be drawn into the centre thereby having the potential to boost these ratings.

Business Occupiers Survey

5.27 The business occupier surveys are discussed in detail under Chapter 4. However, the key findings for Verwood town centre (for which there was a 26% response rate) were as follows:

- The majority of businesses have been trading in the town for over 10 years (60%) or between 3 – 5 years. No businesses had been trading for under one year;
- The majority of businesses are leased (60%) with only 20% of units owner-occupied;
- In terms of plans to change the business, 90% of respondents stated that they had no plans. No businesses stated that they had any plans to relocate either within or outside the town;
- The current trading performance of Verwood's businesses varied with 10% stating it was very good, 40% good and 40% satisfactory. No one rated it as poor;
- When asked whether trading performance had improved over the past 2 years there was disagreement with 20% saying it had declined, 40% saying it had improved and 30% stating it had stayed the same;
- The expected 12 month future trading performance was generally positive with 30% expecting improvement, 50% expecting it to stay the same and no one expecting a decline (although 20% of respondents didn't know);

- The main factors which Verwood businesses believe constrain their performance is high overheads (30%) and competition from other businesses (30%);

- The average score awarded to Verwood town centre by the business respondents was 3.06 which is between neutral and good with the lowest scoring factors being range of shops and services, bus service and the general shopping environment.

- 60% of businesses within Verwood stated that in terms of market position the town is fine as it is although 20% stated that there was not enough variety of shops/retailers and 10% thought it was too down market;

- 50% of businesses feel there are not enough small independent shops within Verwood although 30% consider the mix to be about right and 20% feel that there are already too many small independents and not enough large chain stores;

- The factors seen as the most important future planning issues by businesses were: increase in the range of local/speciality retailers (70%), improve frequency of bus services to the centre (30%), improve the quality and range of cafés and restaurants (30%) and promote/publicise the attractions of the town centre (30%).

SWOT Analysis of Verwood

5.28 The strategic recommendations for Verwood are set out in Section 10, and a review of development opportunities in the centre is summarised in Appendix A. The SWOT Analysis of Verwood below is based on NLP's audit of the centre, the household shopper survey results and discussions with Council officers and stakeholders.

Strengths	**Weaknesses**
• Attractive village feel • Low vacancy rate • Accessible plentiful car parking • The Market	• Lack of town centre supermarket • Limited retailing offer • Fragmented centre
Opportunities	**Threats**
• April Cottage redevelopment	• Out-of-town Morrisons

6.0 WEST MOORS TOWN CENTRE

Introduction

6.1 West Moors is a relatively small centre located just north of Ferndown. It has good links to the A31 giving easy access to the other areas of Dorset. Due to the proximity of the larger towns such as Ferndown, Poole and Bournemouth West Moors has a predominantly local function though nonetheless an important one.

6.2 West Moors is the smallest of the main town centres within the district, behind Ferndown, Wimborne Minster and Verwood. The key issues emerging from NLP's health checks and household survey work is outlined below.

Structure

6.3 The main shopping area of West Moors is concentrated along Station Road and is linear in structure. No Principal or Secondary Retail Frontage is identified on the proposals map of the Local Plan (2002). There are no national multiple comparison retailers, located within the centre and no one area which could be considered to be the 'prime retail pitch'.

Mix of Uses and Occupier Representation

6.4 As shown in the table below, West Moors has 44 ground floor non-residential units. Although convenience provision is largely in line with the national average the proportion of comparison retailers is 16.5% less than this average figure. Conversely service and miscellaneous uses within the town centre is far exceeding this national average figure by 20.1%.

6.5 The vacancy rate within the town centre is relatively low at 6.8% which equates to 3 units. These empty units are dispersed throughout the centre and therefore there are no high concentrations of vacant units in any part of the centre.

6.6 The centre has a high number of service and miscellaneous uses for its size such as a building society and other financial services, hairdressers and estate agents. There are no restaurant units within the town centre although there are two pubs and three takeaways. However, the number of service units within the town does not give rise to concern.

Mix of Uses

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		West Moors (%)	GB Average (%)
Comparison Retail	14	31.8	48.3
Convenience Retail	4	9.1	9.4
Services/Misc	23	52.3	31.6
Vacant/Under Construction	3	6.8	10.7
Total	**44**	**100**	**100**

Breakdown of Comparison Shops

Type of Unit	West Moors		GB
	Number of Units	%	Average (%)
Clothing and Footwear	1	7.1	26
Furniture, carpets and Textiles	2	14.3	10
Booksellers, arts, craft and stationers	0	0	9
Electrical, games, music, photography	1	7.1	11
DIY, hardware and homewares	1	7.1	6
China, glass, gifts and fancy goods	1	7.1	4
Cars, motorcycles and motor accessories	0	0	3
Chemist, drugstore, opticians	2	14.3	8
Variety, Department and catalogue	0	0	2
Florists, nurserymen and seedsmen	1	7.1	2
Toys, hobby, cycle, sport	1	7.1	6
Jewellers	0	0	5
Other Comparison retailers	4	28.6	8
TOTAL	**14**	**100**	**100**

6.7 From the above table it is clear that West Moors has a small number of shops and little choice in terms of comparison goods; and given the small number it is difficult to relate it to the GB averages. There is a distinct lack of clothes and shoe shops, book, arts, crafts, stationers and jewellers and a higher than average provision of furniture shops, chemists and 'other' comparison retailers.

6.8 With regards to the topography of the centre it is relatively flat, non-pedestrianised and largely linear in structure. The majority of the shopping units are fairly modern in design and there is a newly constructed purpose built development containing 5 retail units with residential above located along Station Road, adjacent to Penn Court. Units within the town centre are relatively small with Co-op and Tesco occupying the largest of the units.

6.9 The centre is accessed by the B3072 which runs through the centre. There is no train line within this area and therefore bus is the only form of public transport provision into the town centre.

Town Centre Audit

6.10 As part of the study each of the towns were audited based on 35 factors and awarded a score from 1 (being very poor) to 5 (being very good).

Trade Mix

6.11 As part of the study the primary shopping area was rated in terms of the proportion and quality of national multiple operators, specialist independent traders and uses associated with the evening economy (public houses, bars, restaurants and entertainment uses). The following table represents the scores awarded to West Moors:

Performance Factor	Shopping Area Score
Proportion of special independent traders	3
Quality of special independent traders	2
Proportion of national multiple outlets	1
Quality of national multiple outlets	1
Presence of evening economy	2

6.12 The quality and proportion of independent traders was rated as being ‘neither good nor bad’ as there were a reasonable number although the range was not particularly wide. In terms of national multiples there were no comparison retailers within West Moors and therefore this was given the lowest rating of 1.

6.13 In terms of an evening economy there are no restaurant units within West Moors although there are two local pubs and three takeaways. Therefore, there is not a wide range of options in terms of evening entertainment and consequently this was rated as ‘quite poor’.

Anti-Social Behaviour & Security

6.14 The town centre was also rated in terms of CCTV coverage, police presence and evidence of anti-social behaviour with the following results:

Performance Factor	Shopping Area Score
Evidence of begging/on –street drinking	5
CCTV coverage/police presence	2
Frequency of street lighting	3

6.15 No evidence of begging or on-street drinking was found within the Town Centre and therefore this was rated as ‘very good’. CCTV coverage and police presence were rated as ‘quite poor’ as little evidence of either was found within the town at the time of visiting although this could be largely because it is not deemed necessary. It is understood however that community police officers are often present.. The frequency of street lighting was considered to be ‘neither good nor bad’ although is something which could be improved upon.

Accessibility & Movement

6.16 The key influencing factors for accessibility and movement around the centre were considered during NLP’s visit and are shown in Table _ below.

Performance Factor	Shopping Area Score
Location and convenience of car parks	4
Pedestrian/vehicular conflict	2
Traffic congestion	3
Frequency of pedestrian crossings	3
Frequency of bus stops	4
Quality of bus stops/shelters	3

6.17 Movement in and around the town centre is relatively easy. To the north of the town the majority of the shops are located to the western side of Station Road and therefore there is no need to cross unless visiting the pet shop or dental practice at No. 206 Station Road. At the southern part of the town the retail units are located either side of Station Road although one pedestrian crossing has been provided so this is not too much of an issue. A rating of 2 however was awarded to the town given that there is a relatively busy road running through the centre.

6.18 The location and convenience of bus stops and car parks within the town centre was rated as being ‘quite good’. The quality of bus shelters was only rated as ‘neither good nor bad’ along with traffic congestion and the frequency of pedestrian crossings. Therefore these represent areas which could be improved upon.

Cleaning & Maintenance

6.19 NLP’s survey of the cleanliness and maintenance of the town centre were rated based on six separate factors.

Performance Factor	Shopping Area Score
Litter and street cleaning	5
Gum on paving	4
Evidence of fly-posting	5
Evidence of graffiti	5
Maintenance of paving/street materials	3

Quality of shop frontages/fascia	3

6.20 The cleanliness and maintenance of West Moors is relatively good with 50% of the above factors awarded the maximum score of 5. The amount of gum visible of the street paving was also considered to be 'quite good'. The maintenance of the street materials/paving and the quality of the shop frontages and fascias were rated as being 'neither good nor bad' thereby offering some scope for improvement.

Quality of Streetscape & Environment

6.21 The quality of West Moor's streetscape and the general shopping environment were analysed using 12 separate factors with the results as follows.

Performance Factor	Shopping Area Score
Quality of paving/street materials	3
Quality of street furniture (bins and chairs)	3
Quantity of street furniture (bins and chairs)	2
Quality of Public Art	2
Quality of street signage/maps	3
Quantity of street signage/maps	2
Quality of design of street lighting	3
Quality/attractiveness of commercial properties (inc. upper floors)	4
Quality of planting/trees	3
Quantity of planting/trees	3
Quantity/Quality of town centre parks/public open space	2
Street entertainment/events/ liveliness	2

6.22 The quality of the streetscape in West Moors is considered to be average with the only factor scoring more than three being the quality and attractiveness of the commercial buildings which were rated as being 'quite good'. Street furniture, signage and planting could all be improved in terms of both quality and quantity. The general liveliness of West Moors was also rated as being 'quite poor' at the time of inspection.

Property Vacancies

6.23 The number of vacancies within West Moors was 3 units which is below the national average and therefore this was rated as being 'quite good'. The vacancies were also well dispersed throughout the town and none of the units had the appearance of being long term vacant or derelict. Therefore these two factors were awarded the highest rating of 5.

Performance Factor	Shopping Area Score
Number of vacant units	4
Concentrations of vacant units	5
Derelict/long term vacant units	5

Summary

6.24 Overall West Moors town centre is considered relatively average with the mean score for the 35 factors totalling 3.1 (i.e. 'neither good nor bad'). Two factors were given a rating of 1 which was regarding the number and quality of national retailers. Several factors were also rated as quite poor particularly those relating to the streetscape.

6.25 There was also considered to be a lack of a night time economy in the centre given that there are no restaurant units. Therefore, there is scope to improve the centre in terms of these aforementioned issues.

Business Occupiers Survey

6.26 The business occupier surveys are discussed in detail under Chapter 4. However, the key findings for West Moors town centre (for which there was a 48% response rate) were as follows:

- The majority of businesses have been trading in the town for over 10 years (59%) and between 3-5yrs (20%). No businesses had been trading for under one year;
- The majority of businesses are leased (80%) with only 13% of units owner-occupied;
- In terms of plans to change the business, 60% of respondents stated that they had no plans. However, 19% proposed to refit/extend/improve their units and 14% stated their intentions to relocate either within or out of the town centre;
- The current trading performance of West Moor's businesses was generally positive with 27% stating it was very good, 27% good, 33% satisfactory and 13% poor;
- When asked whether trading performance had improved over the past 2 years there was disagreement with 20% saying it had declined, 20% saying it had stayed the same and 53% stating it had improved;
- The expected 12 month future trading performance was generally positive with 27% expecting improvement and 66% expecting it to stay the same. No respondents were expecting a decline in trade;

- The main factors which West Moors businesses believe constrain their performance is high overheads (47%) and the economy in general (53%);

- The average score awarded to West Moors town centre by businesses was 3.17 which is between neutral and good with the lowest scoring factors being marketing/promotions/events, entertainment and leisure facilities and liveliness and character;

- 72% of businesses within West Moors stated that the town centres market position was fine as it is and no business labelled it as being down market.

- 60% of business respondents stated that in terms of the shopping/services mix West moors was about right although 33% felt that there are not enough small independent shops;

- The three factors seen as the most important future planning issues by businesses were to: make the centre safer (47%), remove/reduce traffic congestion (33%) and increase the range of local/speciality retailers (40%).

SWOT Analysis of West Moors

6.27 The strategic recommendations for West Moors are set out in Section 10, and a review of development opportunities in the centre is summarised in Appendix A. The SWOT Analysis of West Moors below is based on NLP's audit of the centre, the household shopper survey results and discussions with Council officers and stakeholders.

Strengths	**Weaknesses**
• Low vacancy rate • Accessible plentiful car parking	• Proximity to Ferndown • Limited retailing offer • Limited food retailing - low retention rate • No restaurant units
Opportunities	**Threats**
• Potential for redevelopment of Penn Court/Riverside Court	• Increased traffic through town • Proximity of Ferndown, Ringwood and Bournemouth

7.0 WIMBORNE MINSTER TOWN CENTRE

Introduction

7.1 Wimborne Minster is an historic market town located off the A31 and subsequently has strong transport links to Dorchester, Blandford Forum and Ferndown as well as Bournemouth and Poole. Given the growth of the larger centres surrounding it, Wimborne Minster predominantly serves its local community.

7.2 Wimborne is the second largest of the District's shopping centres, behind Ferndown and predominantly serves the surrounding rural communities and tourists drawn to the town due to its strong historic character. The key issues emerging from the household surveys along with NLP's own health check of the town centre is outlined below.

Structure

7.3 The shopping area of Wimborne is rather sporadic and sprawling although it is predominantly focused around the area known as The Square, High Street, East Street, Leigh Road and the Crown Mead area although there are shops in several side streets located off these main areas.

7.4 The Local Plan designates Primary Retail Frontage around The Square and the extent of the High Street. The prime retail pitch, with the highest concentration of national multiples, is located along this designated frontage as well as within Crown Mead which is a purpose built shopping precinct housing national multiples such as Somerfield and WH Smith.

Mix of Uses and Occupier Representation

7.5 The table below illustrates that Wimborne Minster has 162 non-residential ground floor units. Of these units only 9 (5.6%) are convenience retailers which is far below the national average (9.4%). The proportion of comparison retailers is about average although service and miscellaneous provision significantly exceeds the national average.

7.6 The vacancy rate in the town centre is good as it is less than half the national average.

Mix of Uses

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Wimborne Minster (%)	GB Average (%)
Comparison Retail	76	46.9	48.3
Convenience Retail	9	5.6	9.4
Services/Misc	70	43.2	31.6
Vacant/Under Construction	7	4.3	10.7
Total	**162**	**100**	**100**

7.7 The centre has a high number of service and miscellaneous uses for its size in particular banks and other financial services and estate agents. There are also quite a high number of pubs (8), restaurants (6) and takeaways/cafes (6) the majority of which were high quality units.

Breakdown of Comparison Shops

Type of Unit	Wimborne Minster		GB
	Number of Units	%	Average (%)
Clothing and Footwear	19	25	26
Furniture, carpets and Textiles	11	14.5	10
Booksellers, arts, craft and stationers	6	7.9	9
Electrical, games, music, photography	3	3.9	11
DIY, hardware and homewares	3	3.9	6
China, glass, gifts and fancy goods	6	7.9	4
Cars, motorcycles and motor accessories	0	0	3
Chemist, drugstore, opticians	5	6.6	8
Variety, Department and catalogue	1	1.3	2
Florists, nurserymen and seedsmen	3	3.9	2
Toys, hobby, cycle, sport	4	5.3	6
Jewellers	5	6.6	5
Other Comparison retailers	10	13.2	8
TOTAL	**76**	**100**	**100**

7.8 The above table shows that Wimborne sells a wide variety of comparison items and largely reflects the GB average in terms of the proportions of different goods sold. However, electrical, games, music, photography and cars/accessories are underprovided for while there is a high provision of furniture, china, gifts and 'other' comparison retailers.

7.9 With regards to the topography of the town centre it is relatively flat and sprawling. The majority of the shopping units are attractive, traditional conversions although there were some purpose built units around Crown Court and Crown Mead. The units within the town centre vary considerably in size although the majority are relatively spacious.

Town Centre Audit

7.10 As part of the study each of the towns were audited based on 35 factors and awarded a score for each from 1 (being very poor) to 5 (being very good).

Trade Mix

7.11 As part of the study the primary shopping area was rated in terms of the proportion and quality of national multiple operators, specialist independent traders and uses associated with the evening economy (public houses, bars, restaurants and entertainment uses). The following table represents the scores awarded to Wimborne Minster:

Performance Factor	Shopping Area Score
Proportion of special independent traders	5
Quality of special independent traders	5
Proportion of national multiple outlets	2
Quality of national multiple outlets	3
Presence of evening economy	4

7.12 The quality and proportion of special independent retailers within Wimborne Minster was rated as 'very good' due to the variety and quality of goods sold. However, the proportion of national multiple retailers was considered to be 'quite poor' with only seven national comparison retailers located in the centre (Woolworths, Superdrug, Stead & Simpson, Edinburgh Woollen Mill, Julian Graves, WH Smith and Mackays), the quality of which was rated as 'neither good nor bad'.

7.13 In terms of a night time economy Wimborne Minster has several pubs and restaurant units as well as the Tivoli Theatre which doubles as a cinema as well as a venue for live shows. The evening economy has therefore been rated as 'quite good'.

Anti-Social Behaviour & Security

7.14 The town centre was rated in terms of both security and anti-social behaviour as part of NLP's analysis using the three factors specified below:

Performance Factor	Shopping Area Score
Evidence of begging/on –street drinking	5
CCTV coverage/police presence	3
Frequency of street lighting	3

7.15 During NLP's visit to the town centre there was no evidence of either begging or on-street drinking and therefore this was awarded the highest score of 5. However, CCTV coverage and the frequency of street lighting were rated as 'neither good nor bad' and therefore there is some scope to improve on these scores. Overall, Wimborne Minster is considered to offer a relatively strong feeling of safety.

Accessibility & Movement

7.16 Factors influencing accessibility and movement around Wimborne were considered throughout the study i.e. location of car parks, frequency of pedestrian crossing etc.

Performance Factor	Shopping Area Score
Location and convenience of car parks	4
Pedestrian/vehicular conflict	2
Traffic congestion	3
Frequency of pedestrian crossings	2
Frequency of bus stops	4
Quality of bus stops/shelters	3

7.17 Accessibility and movement around Wimborne is seen to be an issue due to the sprawling nature of the town centre along largely unpedestrianised routes which combined with an infrequency of pedestrian crossing and a relatively high volume of traffic leads to a large amount of vehicular/pedestrian conflict.

7.18 However, in terms of the location and convenience of car parking this was rated as being 'quite good' with several car parks of varying sizes throughout the town. In addition the frequency of bus stops was also seen to be quite good although the quality of the stops and shelters could be improved.

Cleaning & Maintenance

7.19 The study also looked at the cleanliness and maintenance of the shopping centre and subsequently rated it based on six separate factors as shown below.

Performance Factor	Shopping Area Score
Litter and street cleaning	5
Gum on paving	4
Evidence of fly-posting	5
Evidence of graffiti	5
Maintenance of paving/street materials	3
Quality of shop frontages/fascia	4

7.20 The cleanliness and maintenance of Wimborne was generally very good with limited evidence of littering, gum, fly-posting or graffiti. In addition the quality of the shop fronts and fascias were seen to be 'quite good'. The only element which offered obvious need of improvement was the maintenance of the street/paving materials as this was awarded a rating of 3.

Quality of Streetscape & Environment

7.21 The quality of the streetscape and general shopping environment were assessed against 12 separate factors within Wimborne town centre as per the table below.

Performance Factor	**Shopping Area Score**
Quality of paving/street materials	3
Quality of street furniture (bins and chairs)	3
Quantity of street furniture (bins and chairs)	3
Quality of Public Art	2
Quality of street signage/maps	3
Quantity of street signage/maps	3
Quality of design of street lighting	3
Quality/attractiveness of commercial properties (inc. upper floors)	4
Quality of planting/trees	5
Quantity of planting/trees	4
Quantity/Quality of town centre parks/public open space	5
Street entertainment/events/ liveliness	3

7.22 The majority of factors were given a rating of 3 ('neither good nor bad') and therefore represent scope for improvement. Due to a lack of public art within the centre this was rated as being 'quite poor'. However the attractiveness of the commercial properties and the quantity of planting were given a rating of 4 (quite good) and the quality of the planting and open spaces within the town centre were deemed to be 'very good' achieving the highest rating of 5.

Property Vacancies

7.23 The proportion of vacant units within the town centre was only 4.3% which is considered to be low and well below the GB average. Therefore this was awarded a rating of 4. In addition the few units which were vacant were dispersed throughout the centre so there were no large concentrations and no units were found to be derelict although units 5-6 Crown Court did appear as though they had been vacant for a reasonable amount of time.

Performance Factor	Shopping Area Score
Number of vacant units	4
Concentrations of vacant units	5
Derelict/long term vacant units	4

Summary

7.24 Overall Wimborne town centre is considered to be relatively good with the average score for the 35 factors totalling 3.7 (i.e. between 'neither good nor bad' and 'quite good'). No factors were given a rating of 1 (very poor) and only four were rated as 'quite poor' with a rating of 2. A total of nine factors were given the maximum score of 5 and ten were awarded a score of 4 which reflects the quality of the centre.

7.25 The areas found to have the largest scope for improvement are reducing pedestrian/vehicular conflicts, increasing the amount of public art and attracting more national multiple retailers into the town to compliment rather than replace the excellent quantity and quality of independent traders present in the town.

Business Occupiers Survey

7.26 The business occupier surveys are discussed in detail under Chapter 4. However, the key findings for Wimborne town centre (for which there was a 33% response rate) were as follows:

- The majority of businesses have been trading in the town for over 10 years (74%) and between 6-10yrs (12%). 5% of businesses had been trading for under one year;
- The majority of businesses are leased (68%) with only 30% of units owner-occupied;
- In terms of plans to change the business, 75% of respondents stated that they had no plans. However, 14% proposed to refit/extend/improve their units and 9% stated their intentions to relocate either within or out of the town centre;
- The current trading performance of Wimborne's businesses varied with 21% stating that it was very good, 35% good, 28% satisfactory and 14% poor;
- When asked whether trading performance had improved over the past 2 years there was disagreement with 16% saying it had declined, 40% saying it had stayed the same and 42% stating it had improved;

- The expected 12 month future trading performance was generally positive with 26% expecting improvement and 51% expecting it to stay the same. Only 7% of respondents were expecting a decline in trade;

- The main factors which Wimborne businesses believe constrain their performance is high overheads (44%) and the economy in general (47%). The availability and location of car parking was also cited as a constraint by 26% of respondents;

- The average score awarded to Wimborne town centre by businesses was 3.10 which is between neutral and good with the lowest scoring factors being rents, bus service, rates and traffic congestion;

- 49% of businesses within Wimborne stated that the town centre's market position was fine as it is although 32% of businesses cited it as being too down market and 5% considered there to be too many charity shops and not enough variety of shops/retailers;

- 44% of business respondents stated that in terms of the shopping/services mix Wimborne was about right although 30% felt that there are not enough small independent shops. Conversely 19% considered there to be too many independents and not enough large chain stores;

- The three factors seen as the most important future planning issues by businesses were to: increase the range of local/speciality retailers (58%), improve quality of shops and services (33%) and improve car parking availability and lower cost (40%).

SWOT Analysis of Wimborne

7.27 The strategic recommendations for Wimborne are set out in Section 10, and a review of development opportunities in the centre is summarised in Appendix A. The SWOT Analysis of Wimborne below is based on NLP's audit of the centre, the household shopper survey results and discussions with Council officers and stakeholders.

Strengths	**Weaknesses**
• Attractive environment • Niche retailing • Low vacancy rate	• Poor linkages/signage • Low quality environment around Crown Mead • Limited food retailing – low retention rate
Opportunities	**Threats**
• Tourist visitors • Waitrose planning application • Potential for pedestrianisation of The Square • National retailer interest	• Some reliance on tourist visitors • Proximity to Poole

8.0 OTHER LOCAL CENTRES

Corfe Mullen

8.1 Corfe Mullen is a settlement in the south west of the District, to the north east of Broadstone. The retail offer in the centre is reasonably good and includes a pharmacy and Co-op food store, as well as a number of service uses, including a Post Office, and takeaways. A small amount of on-street parking is available in front of the shops.

West Parley

8.2 West Parley is an attractive rural settlement in the south east of the District. The local shops are situated in a single parade on one side of a busy main road, with an area of off-road parking in front of the shops. The retail provision is slightly unusual for a local centre; apart from a pharmacy and a Co-op food store, the other units are predominantly independent specialist units. The Co-op food store includes a post office and an ATM machine.

Verwood (Units near Morrison's)

8.3 There are four retail units at the Morrisons site in Verwood. There is a Martin's convenience store, a takeaway, a hairdressers and a vacant unit. The units are all reasonably well maintained, however, they are not well lit and separated from the entrance to Morrison's by a large courtyard area.

9.0 SCOPE FOR ACCOMMODATING GROWTH

Floorspace Projections

9.1 The floorspace projections set out in Volume 1 report assume that new shopping/leisure facilities within the four local authority areas can maintain most of their current market share of expenditure within the study area. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres, such as Poole town centre;
- the re-occupation of vacant floorspace within centres;
- the reliability of long term expenditure projections, particularly after 2016;
- the effect of Internet/home shopping on the demand for retail property;
- the acceptability of higher than average trading levels;
- the level of operator demand for floorspace, bearing in mind the proximity of larger centres;
- the potential impact new development may have on existing centres.

9.2 The analysis identified only 14 vacant shop units within East Dorset, a vacancy rate of 3.9% compared with the national vacancy rate of 10.7%. There appears to be limited scope for vacant shop units to accommodate growth in East Dorset. Even the most successful centres will have a certain level of vacant space at any given time, and this reflects the national trend of occupiers.

9.3 The floorspace projections include short term floorspace figures up to 2011. However, PPS6 suggests local authorities should seek to identify sites to meet the need for new floorspace for at least 5 years from adoption of the Development Plan (i.e. 2013/2014). The Council should identify sufficient sites within the LDF to accommodate identified capacity up to 2016.

9.4 The long term floorspace projections shown in the previous sections (i.e. to 2021 and 2026) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under-review.

9.5 The expenditure projections in this study exclude non-retail business home shopping, because special forms of trading has been excluded from the expenditure per capita estimates. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. However, the impact of Internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and Internet services utilise existing stores rather than warehouses, for example Tesco Direct. Therefore, Internet sales will not always significantly reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the impact of home shopping on expenditure projections is uncertain.

9.6 The quantitative and qualitative assessment of the potential capacity for new retail floorspace within the previous sections suggests that there is scope for new retail development within all authority areas by 2016. These figures have been quoted as net floorspace figures. In considering potential site allocation, it is necessary to convert the figures to gross external floorspace. This has been done below in Table 9.1 below which assumes a net to gross ratio of 75% and rounds figures where appropriate. It may also be reasonable to expect up to a further 15% floorspace to be devoted to other non-retail Class A uses (Classes A2 to A5) which is reflected in the Total column. The range in figures represents the two different population scenarios tested.

Table 9.1: Gross Retail Floorspace Requirements at 2016

	Convenience	**Comparison**	**Total Class A Floorspace**
East Dorset	7,250 – 8,500 sq m	10,200 – 12,600 sq m	20,000 – 24,250 sq m

9.7 In total between 20,000 to 24,250 sq m gross of retail floorspace could be required by 2016, which represents a 35% to 42% increase in existing floorspace.

9.8 The top end of the range could be supported if the higher house completion rates and urban extension areas are implemented as envisaged in the RSS Panel Report. However, if the lower draft RSS completion rates are implemented then the lower floorspace projections may be more appropriate. If urban extensions are implemented in East Dorset then it is likely these new residential areas will require new local/neighbourhood centres, which will accommodate some of the floorspace projections shown above. An element of East Dorset's floorspace projections will be required within urban extensions in West Parley, Corfe Mullen and Ferndown. The level of floorspace will need to be determined when the scale and phasing of development is known.

9.9 This section examines the opportunities for accommodating this projected growth and assesses potential opportunities to accommodate this floorspace.

Potential Development Opportunities

9.10 The need and capacity for additional retail and other main town centre uses within the local authority areas, particularly in the short to medium term (over the next 5 to 10 years), will need to be considered within the context of available development opportunities. The ability of the town centres to accommodate some or all of this potential needs to be addressed.

9.11 Having identified the scope for new development within East Dorset, potential sites and opportunities to accommodate this space, within or adjacent to existing centres, have been considered. The options include edge-of-centre sites capable of accommodating larger format food and non-food retail developments (re. PPS6 para. 2.43). The identification of opportunities has involved the following strands of work:

- discussions with Council officers to review potential development sites, emerging proposals and their local knowledge of other sites that may emerge; and
- NLP's own surveys of the centres to identify possible areas suitable for redevelopment, expansion of the centre boundary, refurbishment or expansion i.e. centre or edge-of-centre sites.

9.12 This process has generated a short list of potential opportunities. Each option identified has been assessed in terms of its suitability for different forms of development, including retail, leisure and entertainment facilities. The analysis has considered a number of issues, including:

- the PPS6 sequential approach to site selection, including linkages with the primary retail area;
- the capacity of the site to accommodate new floorspace and the type of retail or other town centre use suitable on the site;
- the availability of sites for development within a 5 year period, or in the longer term;
- an initial view of commercial viability and development constraints;
- land ownership and land assembly difficulties;
- operator demand for space within the centre;
- accessibility (particularly by public transport);
- the regeneration benefits of development;
- other preferred uses for the site (such as housing); and
- service arrangements and potential traffic congestion problems.

9.13 Sites in each centre have been evaluated, in terms of their implications on the scope and need for additional retail and leisure facilities, and have been assessed against the following factors:

- existing land uses and availability, categorised as follows:
  - short term – up to 2011;
  - medium term – 2011 to 2016
  - long term - likely to be completed after 2016;
- commercial potential for retail/leisure development and the most likely form of development, categorised as follows:
  - prime site - likely to attract a developer and occupiers;
  - secondary site – which may generate limited demand or only demand for a specific kind of use.
- potential scope to accommodate additional retail/leisure floorspace (net increase), categorised as follows:
  - small scale - up to 1,000 sq m gross floorspace;
  - medium scale – 1,000 to 2,500 sq m gross floorspace;
  - large scale - over 2,500 sq m gross floorspace;
- potential development constraints; and
- possible alternative uses.

9.14 The overall development prospects of each opportunity, taking on board all of the factors listed above, has been categorised as follows:

- *Good* - development sites that have good prospects for providing additional retail/leisure floorspace, and should be considered for implementation in the short to medium term;
- *Reasonable* - development sites which are well located and may provide potential for additional floorspace, although obstacles to development will need to be overcome, but implementation may only be achieved in the long term; and
- *Poor* - development sites that may be unattractive or unsuitable for retail or leisure development where their delivery is very uncertain.

9.15 This overall rating is based on an initial evaluation for each site. The level of analysis undertaken at this stage is limited, i.e. detailed appraisals of development constraints, land ownership and potential development costs have not been undertaken. More detailed examinations of each site will need to be undertaken before sites can be brought forward for development or ruled out as viable options. The evaluations undertaken for each opportunity are not detailed planning appraisals and they do not imply that planning permission should be granted or refused for retail/leisure development on any site. However, the evaluation is expected to identify potentially suitable development opportunities that may be worthy of further consideration by the respective Council. This evaluation provides a framework within which the Council can consider the implementation of a development strategy for the centres in the District.

Evaluation of Potential Development Sites in East Dorset

9.16 Each opportunity site identified has been evaluated based on the factors listed earlier in this section. An assessment of each site is provided in Appendix F, and is summarised in Table 9.2.

9.17 Within the four town centres in East Dorset 12 potential development opportunities have been identified, 1 in Verwood, 2 in West Moors 4 in Ferndown and 5 in Wimborne. Of which 10 sites have “reasonable” to “good” potential to deliver additional retail/leisure floorspace in the short to medium term.

9.18 The priority should be to seek to accommodate the need for new development in the short to medium term (up to 2016). As indicated in Table 9.1, the projection for retail floorspace in East Dorset as a whole is up to 20,000 – 24,250 sq m gross up to 2016, depending on the population growth scenario.

Table 9.2: East Dorset Site Evaluation Summary

Site	Potential Scale Retail/Leisure Development	Potential Availability	Overall Development Potential
Verwood			
VER1 – Inglenook	Small scale	Short term	Good
West Moors			
WEST 1 – Library	Small scale	Medium term	Poor
WEST 2 – Penn Court Car Park	Small scale	Short/medium	Reasonable
Ferndown			
FERN 1 – Day Centre	Small scale	Medium/long term	Reasonable
FERN 2 – Library Road	Medium term	Medium/long term	Reasonable
FERN 3 – Victoria Road	Small scale	Medium/long term	Good/reasonable
FERN 4 – Fire Station	Small scale	Medium/long term	Poor
Wimborne			
WIM 1 – Park Lane Car Park	Small scale	Short/medium term	Reasonable
WIM 2 – Telephone Exchange	Medium scale	Medium/long term	Reasonable
WIM 3 – Library	Small scale	Medium term	Reasonable
WIM 4 –Royal British Legion	Small scale	Medium term	Reasonable
WIM 5 – Fire/Police Stations	Medium scale	Long term	Short term – poor Long term - reasonable

9.19 Short to medium term opportunities identified are perhaps capable of accommodating around 7,000 sq m gross of Class A1 to A5 floorspace, and would only meet about 35% of the District wide floorspace projections up to 2016.

9.20 This analysis suggests that sites within or adjacent to designated centres may be incapable of meeting the need for new floorspace over the plan period. In the medium to long term (after 2011) it may be necessary to identify development sites within out-of-centre locations in order to meet the need for development. Alternatively, the strategy could plan for a reduction in the District's market share of expenditure in the future, in particular the share of comparison expenditure. This approach would assume that expenditure leakage to Poole and Bournemouth will increase in proportional terms due to major developments in these locations.

9.21 The Council needs to investigate the potential availability of the sites identified above with land owners, and determine whether they are likely to become available for redevelopment by 2016. The potential allocation of these sites will need to be considered in the emerging Site Allocations DPD.

10.0 CONCLUSIONS AND POLICY RECOMMENDATIONS

Strategy for Accommodating Future Growth

10.1 The floorspace projections shown in Volume 1 provide broad guidance. Meeting the projections between 2007 and 2016 is the priority, and longer term projections need to be monitored. The floorspace projections should not be considered to be maximum or minimum limits or targets, particularly when translated into the development plan allocations or when used to guide development control decisions. Floorspace projections should not inhibit competition between retailers when located within centres, subject to the consideration of scale and impact. However, if an out-of-centre proposal exceeds the floorspace projections then the need for the proposal and impact will need to be carefully considered.

10.2 The sequential approach suggests that town centre sites should be the first choice for retail and commercial leisure development. The ability of the town and district centres as the preferred locations for retail and leisure development, needs to be considered, particularly for development which may have a relatively large catchment area.

10.3 Some forms of retail or leisure facilities which serve more localised catchment areas may be more appropriate within local centres, rather than the main town/district centres. However, all development should be appropriate in terms of scale and nature to the centre in which it is located.

10.4 The existing stock of premises may have a role to play in accommodating projected growth. However the low vacancy rate in East Dorset suggests there is limited potential to accommodate growth in vacant units.

10.5 The retail capacity analysis in the Volume 1 report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 1.5% per annum is assumed for comparison floorspace and 0.3% for convenience floorspace. The adoption of these growth rates represents a balanced approach. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

10.6 Based on existing market shares the highest identified quantitative need for retail development is within Ferndown. However, there is scope to redistribute convenience expenditure growth to other centres within the District, in particular Wimborne.

10.7 The projection for retail floorspace in East Dorset as a whole is up to 20,000 – 24,500 sq m gross up to 2016, depending on the population growth scenario. However, short to medium term opportunities identified are perhaps only capable of accommodating around 7,000 sq m gross of Class A1 to A5 floorspace, and would only meet about 35% of the District wide floorspace projections up to 2016. East Dorset’s main centres may be incapable of meeting the need for new floorspace over the plan period.

10.8 It may be necessary to identify development sites within out-of-centre locations in order to meet the need for development. However, if urban extensions are implemented then some of this floorspace projection could be accommodated in new local and neighbourhood centres to serve the new residential areas.

10.9 Alternatively, the strategy could plan for a reduction in the District’s market share of comparison expenditure. This approach would assume that expenditure leakage to Poole and Bournemouth will increase in proportional terms due to major developments in these locations.

10.10 Based on our analysis the priorities for the main centres is as follows:

- Wimborne – a mix of unit sizes to attract both chain stores and small independent shops and services and a new large food store;
- Ferndown – a mix of unit sizes to attract both chain stores and small independent shops and services;
- West Moors – limited growth in predominantly small to medium sized units (200 sq gross or below) suitable for small independent shops and services; and
- Verwood - limited growth in predominantly small to medium sized units (200 sq gross or below) suitable for small independent shops and services.

The Role of Shopping Centres

10.11 PPS6 indicates that local planning authorities should adopt a positive and proactive approach to planning for the future of the centres within their areas, whether planning for growth, consolidation or decline. Local planning authorities are expected to set out a vision and strategy for the pattern and hierarchy of centres, including local centres, within their area. This strategy should set out how the role of different centres will contribute to the overall vision for their area.

10.12 Annex A (Table 1) of PPS6 provides guidance on the designation and role of centres. It suggests that city centres are the highest level of centre and will often be a regional centre and will serve a wide catchment. Town centres are usually the second level of centre after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns or other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the futures of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.

10.13 PPS6 suggests that district centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. PPS6 states that local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.

10.14 PPS6 does not provide a definition of centres below local centres. However, the footnotes to Table 1 indicate that small parades of shops of purely neighbourhood significance are not regarded as centres for purposes of the policy statement. Based on the hierarchy of centres in PPS6, a summary of recommended definitions is set out in Table 10.1.

Table 10.1: Hierarchy of Centres

Centre Classification	Definition/Comment
Town Centres	Their attractiveness for retailing is derived from a mix of comparison and convenience shopping. Will include the principal centres within a local authority's area.
District Centres	As described in Annex A of PPS6. The primary role of these centres will be the provision of convenience shopping, services but with some comparison shopping serving a relatively localised catchment area or shopping of a specialist nature.
Local Centres	As described in Annex A of PPS6 reasonably large centres of more than purely neighbourhood significance should be designated local centres.
Local Parades	All other small local shopping parades should be designated as neighbourhood parades.

10.15 A key issue is whether any of the town, district and local centres within the local authority areas should be reclassified from their current Local Plan designation.

10.16 The existing hierarchy of centres in the District are as follows:

Table 10.2: Summary of Centres in East Dorset

Centre	Current Designation	Number of Outlets	Number of Comparison Shops
Ferndown	Town centre	113	41
Verwood	Town centre	37*	9
Wimborne	Town centre	162	76
West Moors	Town centre	44	14
Corfe Mullen	Local centre	15	3
West Parley	Local centre	15	9

* five new units under-construction are excluded from the Verwood figure

10.17 There is a clear disparity between the size and function of Ferndown and Wimborne when compared with Verwood and West Moors. The former have over 100 commercial units and provide a wide range of convenience, comparison and service uses. Verwood and West Moors could be re-designated as District Centres. Verwood will be expanded following the development of five new shops units and the Hub provides a concentration of non-retail facilities and community uses. Verwood has a large food store (Morrisons) but this is separate from the main centre. The Council needs to consider whether Verwood and West Moors are to be further expanded in the future in order to maintain their status as town centres, alternatively the following hierarchy of centres could be considered. Other small clusters of local shops should be protected by development plan policies, because they fulfil an important role.

Table 10.3: Possible Hierarchy of Centres in East Dorset

Status	Centre
Town Centres	Ferndown Wimborne
District centres	Verwood West Moors
Local centres	Corfe Mullen West Parley
Parades/Village Shops	All other small clusters of shops

Defining Centre Boundaries and Retail Frontages

10.18 PPS6 indicates that local authorities should define the boundary of town and district centres. It states that for purposes of this policy statement, the "centre" for a retail development constitutes the primary shopping area. For all other main town centre uses the "centre" should be regarded as the area embraced by the town centre boundary. The extent of the town centre should be defined on the Proposals Map.

10.19 PPS6 states that the Primary Shopping Area should be the defined area where retail development is concentrated (generally comprising the primary frontages and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, and therefore the town centre may not extend beyond the primary shopping area. Primary frontages are likely to include a high proportion of retail uses. Secondary frontages provide greater opportunities for a diversity of uses.

10.20 The adopted East Dorset Local Plan (Jan 2002) states that the District has three 'main town centres' at Wimborne Minster, Ferndown and Verwood and a 'smaller centre' at West Moors. Within these centres the plan states that a diversity of mixed use development will be encouraged. Further to this the plan aims to limit the amount of shopping development outside of the District or Local Centres. Policy SHDEV2 states that out-of-centre shopping developments will only be allowed if:

- they do not detract from the quality, diversity, attractiveness, character, vitality and viability of existing centres;

- they do not reduce the range of services which the centres provide or endanger investment in them or lead to shops falling vacant;
- there are no suitable town or edge-of-centre sites available to accommodate the development;
- they should also be served by sufficient public transport, easily accessible for all and overall reduce the reliance on cars.

10.21 This policy is broadly in line with the sequential approach championed in PPS6, and does not require amendment.

10.22 Policy SHDEV5 states that in district shopping centres and town centres permissions will be granted for restaurants and takeaways will be granted where flues associated with the use can be provided without detriment to the appearance of the building.

10.23 This policy therefore does not appear to protect the vitality and viability of the town centres in terms of retaining units for class A1 use. However, the Local Plan discusses each centre in isolation.

Wimborne Minster

10.24 Policy WIMCO5 of the local plan states that development for uses falling within use classes A1, A2, A3 and B1 will be permitted within the commercial area of Wimborne where it will not result in the loss of a dwelling. However, Policy WIMCO6 states that within the primary retail frontage (as defined on the proposals map) only A1 shop uses will be allowed at ground floor level.

10.25 The Square and the extent of the High Street are currently designated as primary retail frontage which is considered appropriate but could be extended to include Crown Mead. However, it is recommended that secondary frontage is also designated within the centre to cover areas such as East Street, Leigh Road, West Borough, Cook Row, Mill Lane, West Street, West Row, Church Street, East Borough and Park Lane.

Ferndown

10.26 Policy FWP5 states that use classes A1, A2, A3 and B1 will be permitted in the commercial centre of Ferndown. However, within the primary retail frontage (as defined on the proposals map) only A1 shop uses will be allowed at ground floor level.

10.27 The current primary retail frontage covers a small area only, thereby leaving the remainder of the town vulnerable to loss of A1 units. Therefore, it is considered that the frontage designations should be reassessed and redesignated as primary and secondary frontages as per PPS6. This would enable the secondary frontages to also be protected from a high concentration of non A1 use classes where appropriate.

Verwood

10.28 There are no frontage designations within Verwood Town Centre which is expected given its restricted size and it is not considered necessary to change this.

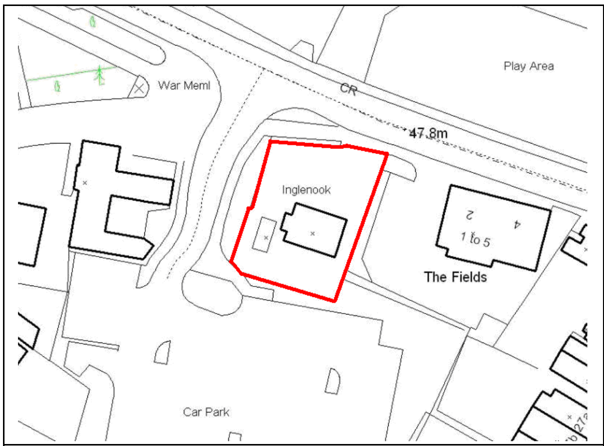
West Moors

10.29 There are no frontage designations within West Moors Town Centre which is expected given its restricted size.

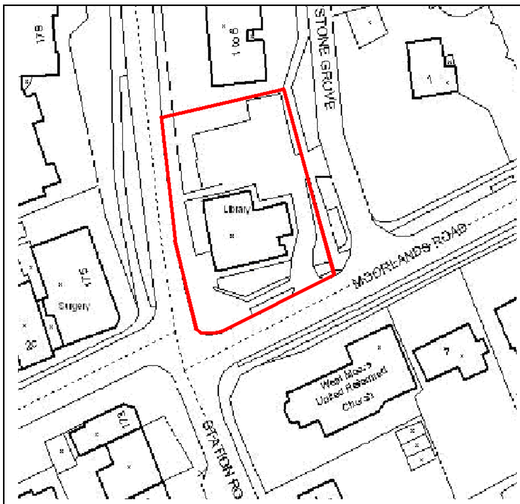
Appendix A

Evaluation of Potential Development Sites

SITE VER1: Inglenook

	The site is located within the town centre policy area. It is currently occupied by a residential dwelling. The site could be redeveloped to provide commercial development
Evaluation Criteria	*Comment*
Availability	Uncertain but could be available in the short term.
Scale of Development (retail/leisure/community/cultural)	Small scale (less than 500 sq m gross at ground floor level)
Commercial Potential	Within the centre boundary with good road frontage on to Station Road. It is located adjacent to the existing One-Stop Shop.
Likely type of development	1 to 3 retail units, with residential or offices on upper floors.
Development Constraints	Availability of site for redevelopment is uncertain.
Possible Alternative uses	Residential development
Access	Existing access from Station Road/Ringwood Road.
Overall Development Prospects	Good

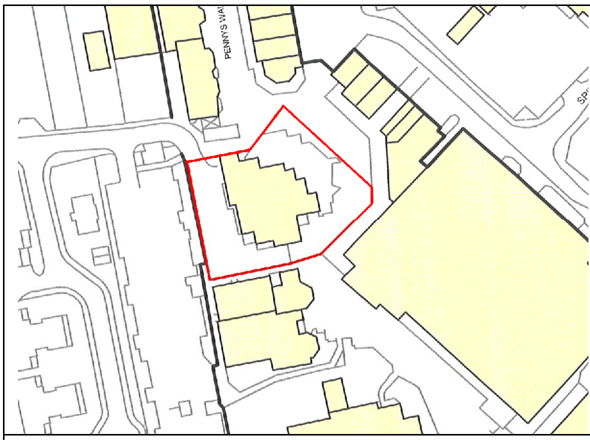
SITE WEST1: Library, West Moors

	The Library is relatively low density (although the Parish office and small staff car park also are within the site) and occupies a relatively large area (0.1ha) and is located within the town centre policy area.
Evaluation Criteria	*Comment*
Availability	Medium term
Scale of Development (retail/leisure/community/cultural)	Small scale (about 500 sq m gross at ground floor level)
Commercial Potential	Within the centre boundary with good road frontage on to Station Road.
Likely type of development	1 to 5 retail units, with residential on upper floors.
Development Constraints	Availability of site for redevelopment is uncertain. Retention of existing Library may be desirable. The library has recently been extended. An alternative location for the library would be required.
Possible Alternative uses	Retention of existing Library.
Access	Existing access from Station Road/Moorlands Road.
Overall Development Prospects	Poor

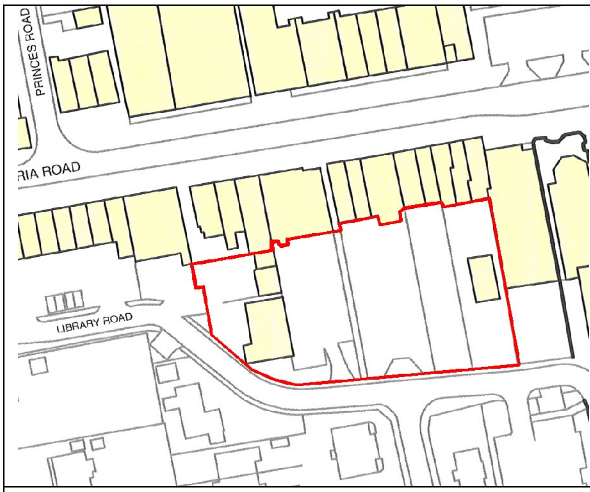
SITE WEST2: Penn Court Car Park, West Moors

	The Penn Court Car Park could be developed to provide additional shop units. The site is within the designated centre boundary.
Evaluation Criteria	*Comment*
Availability	Short/Medium term
Scale of Development (retail/leisure/community/cultural)	Small scale (about 200 sq m gross at ground floor level)
Commercial Potential	This site is in a prominent position in the centre.
Likely type of development	Parade of shop units facing the existing Penn Court units.
Development Constraints	Loss of car parking may need to be replaced.
Possible Alternative uses	Retention of existing car park.
Access	Existing access from Pennington Road.
Overall Development Prospects	Reasonable.

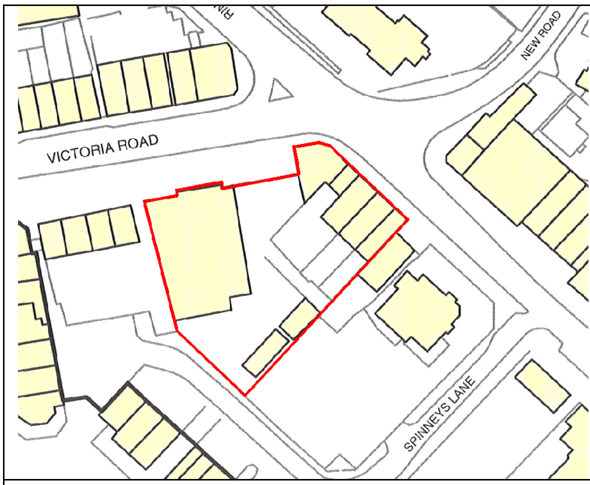
SITE FERN1: Ferndown Day Centre, Ferndown

	The Day Centre and surrounding open area is relatively low density and occupies a relatively large area (0.2ha). It is located within the town centre policy area and is adjacent to the main public car park. If redeveloped, it could provide a new or relocated day centre with new ground floor shop units fronting to Penny's Walk.
Evaluation Criteria	*Comment*
Availability	Medium/Long term
Scale of Development (retail/leisure/community/cultural)	Small scale (about 1,000 sq m gross at ground floor level)
Commercial Potential	Within the centre boundary with good pedestrian frontage on to Penny's Walk.
Likely type of development	Parade of retail units, with replacement Day Centre on upper floors and to the rear.
Development Constraints	Availability of site for redevelopment is uncertain. Retention of existing Day Centre may be desirable. Cost of replacement Day Centre may be prohibitive.
Possible Alternative uses	Retention of existing Day Centre.
Access	Existing pedestrian access from Penny's Walk and road from Library Road.
Overall Development Prospects	Reasonable

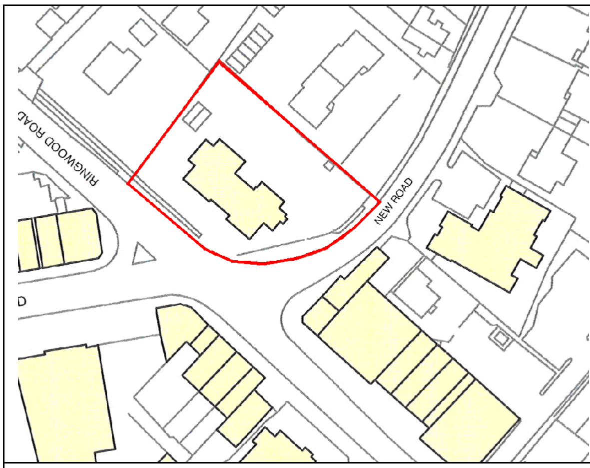
SITE FERN2: Service Yards/Car Parks, Library Road, Ferndown

	The area to the rear of numbers 55 to 91 Victoria Road (0.4ha) could be assembled to provide a high density mixed use development. It is located within the centre boundary.
Evaluation Criteria	*Comment*
Availability	Medium to long term
Scale of Development (retail/leisure/community/cultural)	Medium scale (up to 2,000 sq m gross at ground floor level)
Commercial Potential	Located in the heart of the town centre. Potential to create a new parade of shopping accessed off Victoria Road or enlarged units fronting Victoria Road.
Likely type of development	The provision of new mall off Victoria Road with residential or offices on upper floors.
Development Constraints	Multiple land ownerships may make land assembly difficult and availability for development is uncertain. Loss of private car parks.
Possible Alternative uses	Retention of existing service yards and private car parks.
Access	Existing access from Library Road.
Overall Development Prospects	Reasonable.

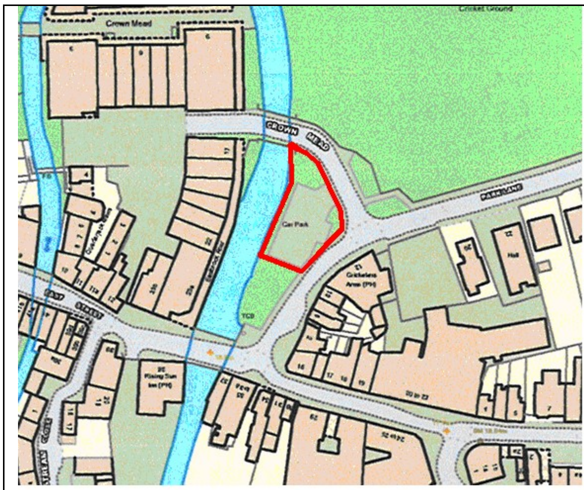
SITE FERN3: Number 17 Victoria Road and Land to the rear of Victoria Road, Ferndown

	The area to the rear of number 17 Victoria Road (0.2ha) could be assembled to provide a high density mixed use development. It is located within the centre boundary.
Evaluation Criteria	*Comment*
Availability	Medium to long term
Scale of Development (retail/leisure/community/cultural)	Small scale (up to 1,000 sq m gross at ground floor level)
Commercial Potential	Located in the heart of the town centre. Low density development with potential to create a shopping frontage on Victoria Road and high density mixed use development.
Likely type of development	Parade of shop units with residential or offices on upper floors.
Development Constraints	Availability of site and may be in multiple ownerships.
Possible Alternative uses	Retention of existing uses.
Access	Existing access from Library Road.
Overall Development Prospects	Good/Reasonable.

SITE FERN4: Fire Station, Ferndown

	The Fire station is relatively low density and occupies a relatively large area (0.15ha) and is located within the town centre policy area.
Evaluation Criteria	*Comment*
Availability	Medium/Long term
Scale of Development (retail/leisure/community/cultural)	Small scale (up to 1,000 sq m gross at ground floor level)
Commercial Potential	Within the centre boundary with good road frontage on to Ringwood Road, but separated from the main shopping area by a busy road junction.
Likely type of development	Parade of retail units with residential on upper floors.
Development Constraints	Availability of site for redevelopment is uncertain. Relocation of the Fire station would be required. The site has poor linkages to the rest of the centre.
Possible Alternative uses	Retention of existing Fire station.
Access	Access from Ringwood Road or New Road.
Overall Development Prospects	Poor

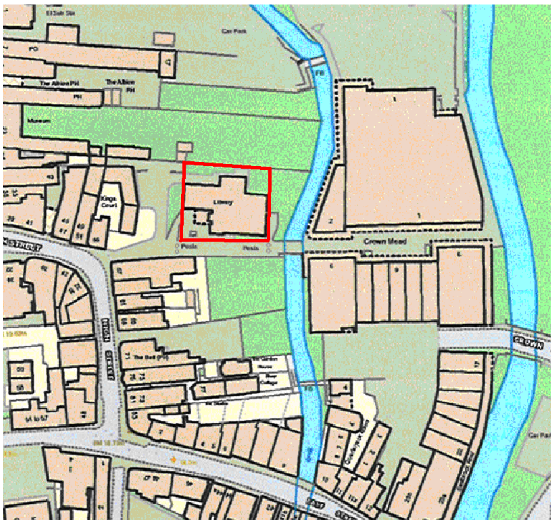
SITE WIM1: Park Lane Car Park, Wimborne Minster

	The Park Lane Car Park occupies a small riverside site on the periphery of the town centre.
Evaluation Criteria	*Comment*
Availability	Short to Medium term
Scale of Development (retail/leisure/community/cultural)	Small scale (less than 500 sq m gross)
Commercial Potential	This site could provide an attractive riverside location for Class A3/A4 use.
Likely type of development	Single Class A3/A4 use.
Development Constraints	Loss of car parking may need to be replaced. Flood risk may be an issue.
Possible Alternative uses	Retention of existing car park or redevelopment for office or residential use.
Access	Existing access from Park Lane.
Overall Development Prospects	Reasonable

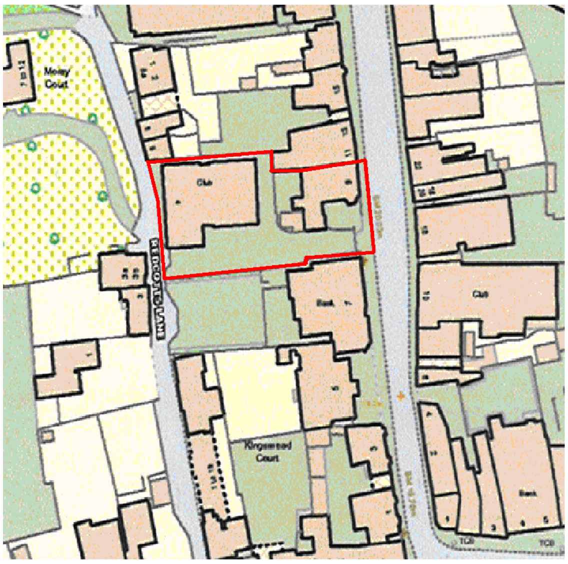
SITE WIM2: Telephone Exchange, Poole Road, Wimborne Minster

	The Telephone Exchange is located on the south east periphery of the town centre, and occupies a site of approximately 0.3ha.
Evaluation Criteria	*Comment*
Availability	Medium/Long term
Scale of Development (retail/leisure/community/cultural)	Medium scale (over 1,500 sq m gross at ground floor level)
Commercial Potential	This site has good road frontage onto Poole Road, but is within a relatively secondary location within the town centre boundary.
Likely type of development	Large shop units fronting on to Poole Road with residential or office uses on upper floors. Alternatively a single large format retail/leisure unit with car parking.
Development Constraints	Availability of Telephone Exchange for redevelopment is uncertain. The relocation costs of the existing use may be prohibitive.
Possible Alternative uses	Retention of existing Telephone Exchange or redevelopment for office or residential use.
Access	Existing access from Poole Road.
Overall Development Prospects	Reasonable

SITE WIM3: The Library, Wimborne Minster

	The Library is relatively low density and is located in the heart of the town centre. It occupies a small site on a relatively large area (0.05ha) but could be redeveloped to provide higher density development.
Evaluation Criteria	*Comment*
Availability	Medium term
Scale of Development (retail/leisure/community/cultural)	Small scale (about 500 sq m gross at ground floor level)
Commercial Potential	Within the heart of the town centre shopping area.
Likely type of development	Up to 5 retail units, with a new library on upper floors.
Development Constraints	Availability of site for redevelopment is uncertain. Retention of existing Library may be desirable.
Possible Alternative uses	Retention of existing Library.
Access	Existing access through Crown Mead or via the High Street.
Overall Development Prospects	Reasonable

SITE WIM4: Royal British Legion and Number 9 West Borough, Wimborne Minster

	The British Legion and Number 9 West Borough occupy a small site (approximately 0.1ha) within the heart of the town centre.
Evaluation Criteria	*Comment*
Availability	Medium term
Scale of Development (retail/leisure/community/cultural)	Small scale (over 500 sq m gross at ground floor level)
Commercial Potential	Within the heart of the main shopping area with good road frontage on to West Borough.
Likely type of development	1 to 4 retail units, perhaps with residential on upper floors.
Development Constraints	Availability of site for redevelopment is uncertain. Need to relocate existing club may be required.
Possible Alternative uses	Development for residential use.
Access	Existing access from West Borough.
Overall Development Prospects	Reasonable

SITE WIM5: Fire and Police Station, Wimborne Minster

	The Fire station, Police Station and Magistrates Court are relatively low density and occupy a relatively large area (0.5ha) and are located within the town centre boundary.
Evaluation Criteria	*Comment*
Availability	Long term
Scale of Development (retail/leisure/community/cultural)	Medium scale (up to 2,000 sq m gross at ground floor level)
Commercial Potential	Within the centre boundary with good road frontage on to Hanham Road, but separated from the main shopping area. The site is large enough to accommodate large format stores within a reasonably central area. However linkages with the town centre shopping area would need to be improved.
Likely type of development	Large format retail or leisure units.
Development Constraints	Edge of centre site it terms of the sequential approach, and has poor linkages to the rest of the town centre would need to be improved. Availability of site for redevelopment is uncertain. Relocation of existing uses would be required, and this may only be a long term opportunity.
Possible Alternative uses	Retention of existing civic uses.
Access	Access via Hanham Road and Allenview Road.
Overall Development Prospects	Short term - Poor Long term - Reasonable

Appendix B

Summary of Feedback from Stakeholder Workshops

East Dorset Retail Study Stakeholder Event
3rd December 2007

Ferndown

Issues arising

Parking and Traffic

- Heavy traffic levels in the town centre (especially HGV's)
- Car parking - generally good
- Concern that Tesco may charge for their car park in the future
- Management issues of private car parks on the eastern side of the town

Shopping Environment

- Shopping precinct looks tired and dated
- Current range of retail units is limited – especially lack of clothes shops
- Concern that more national multiples will provide a negative impact on smaller retailers
- Problem of management of Penny's Walk

Marketing

- Better marketing of the centre perhaps jointly between Chamber of Trade and EDDC

Other Matters

- Support Groups for businesses
- Unified vision of the town between all retailers
- Use of Town Plans for visitors

Summary of the Aspirations for the Future

- Better marketing of the town centre
- Improved sign posts in the town centre
- Town Centre Manager
- Better co-operation between the large and small retailers
- Pedestrianisation of the upper part of Victoria Road
- Traffic relief in town centre – especially HGV's
- Improvement of the general environment

Verwood

Issues arising

Parking and Traffic

- Potters Wheel free car park is nearly full on the monthly Farmers Market day – need to consider further town centre parking provision

Shopping Environment

- Some shops have poor accesses / slopes which restrict access to the elderly, the disabled and those with pushchairs
- Limited range of retail shops now to what there was 10 or 20 years ago
- Shops in the centre of the town are very dispersed

Marketing

- The town needs better marketing
- A Town map could be provided to show facilities and distributed locally – such as to visitors to

the camp site at Sutton Hill

Other Matters

- The two town centres in Verwood are seen as a weakness to the town
- The Heritage Centre on Ferret Green functions as a successful heart and focal point to the town centre
- The future changes at Morrison's are seen as an opportunity for the town but there is a worry that the other shop units in this precinct will be a lost to the community

Summary of the Aspirations for the Future

- Better marketing of the town to visitors and residents
- Better co-ordination between Morrison's and the town centre
- Further car parking provision in the town centre
- Improved access arrangements to shops
- Better mix of shops

Wimborne

Issues arising

Parking & Traffic

- The Square – conflict between buses and cars
- Concern that people want on-street parking and circle the town looking for spaces
- Abuse of disabled badge system
- Speeding traffic in East Street
- Park and Ride needed
- Better signage for car parks – indicator boards showing spaces available

Shopping Environment

- Enhancement of The Square – generally seen as a positive step to encourage people to spend time in the town
- High Street is very wide – difficult for pedestrians to cross safely
- Too much street clutter – 'A' boards, multiple signs –many are superfluous

Marketing

- Needs to be looked at jointly between Chamber of Trade and EDDC

Other Matters

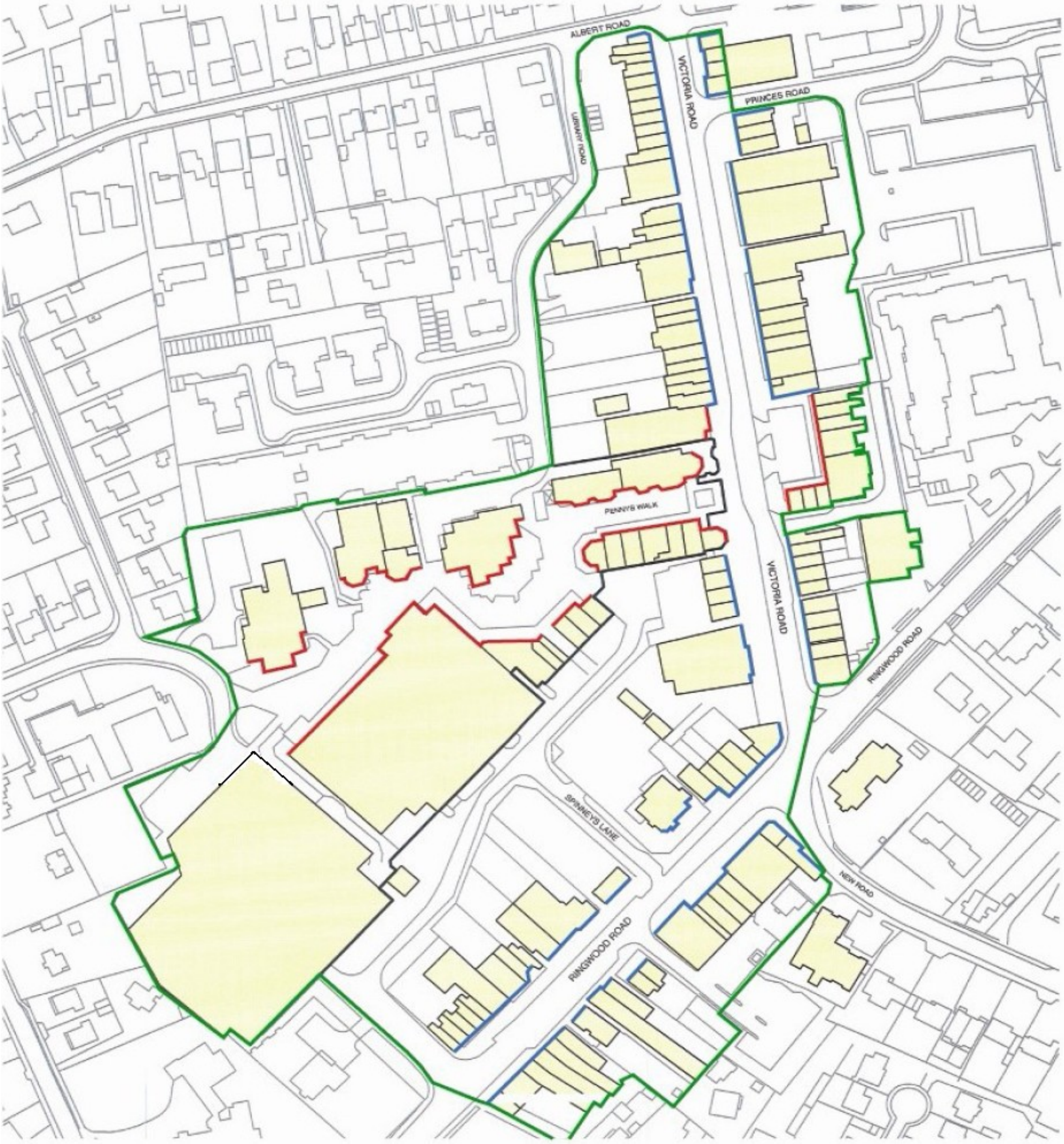
- The market brings in many shoppers to the town
- Future of the Cricket Ground
- Food / convenience shopping

Summary of the Aspirations for the Future

- Pedestrianisation
- Town Centre Management / Manager
- Better marketing and promotion
- Better bus terminal

Appendix C

Recommended PSA boundaries and retail frontages



KEY

Proposed PSA Boundary

Proposed Primary Frontage

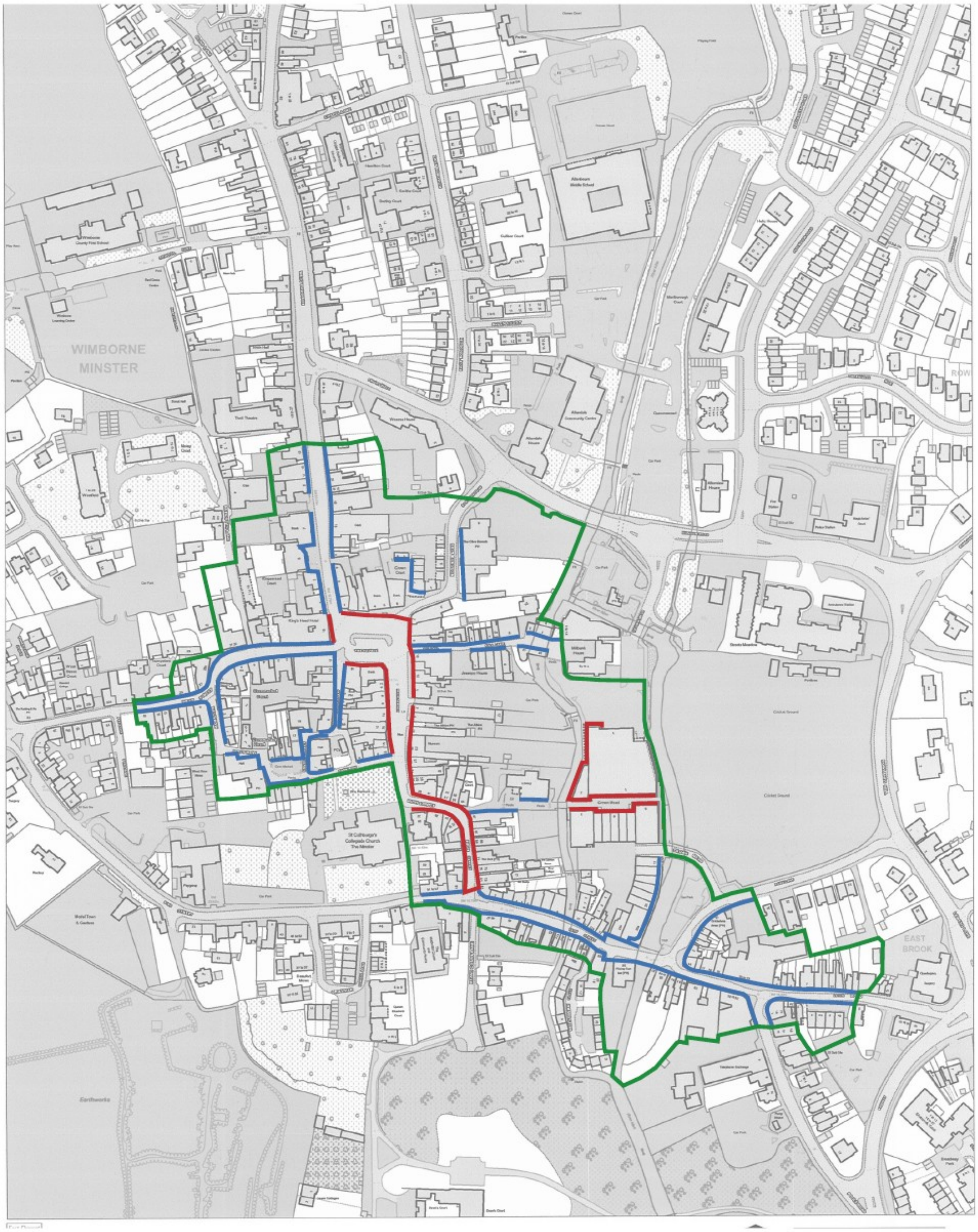
Proposed Secondary Frontage

Nathaniel Lichfield and Partners

Project	Joint Dorset Retail Study
Title	**Ferndown Frontages**
Client	East Dorset District Council
Date	March 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30423/03

N

IL30423-03



KEY

Proposed PSA Boundary

Proposed Primary Frontage

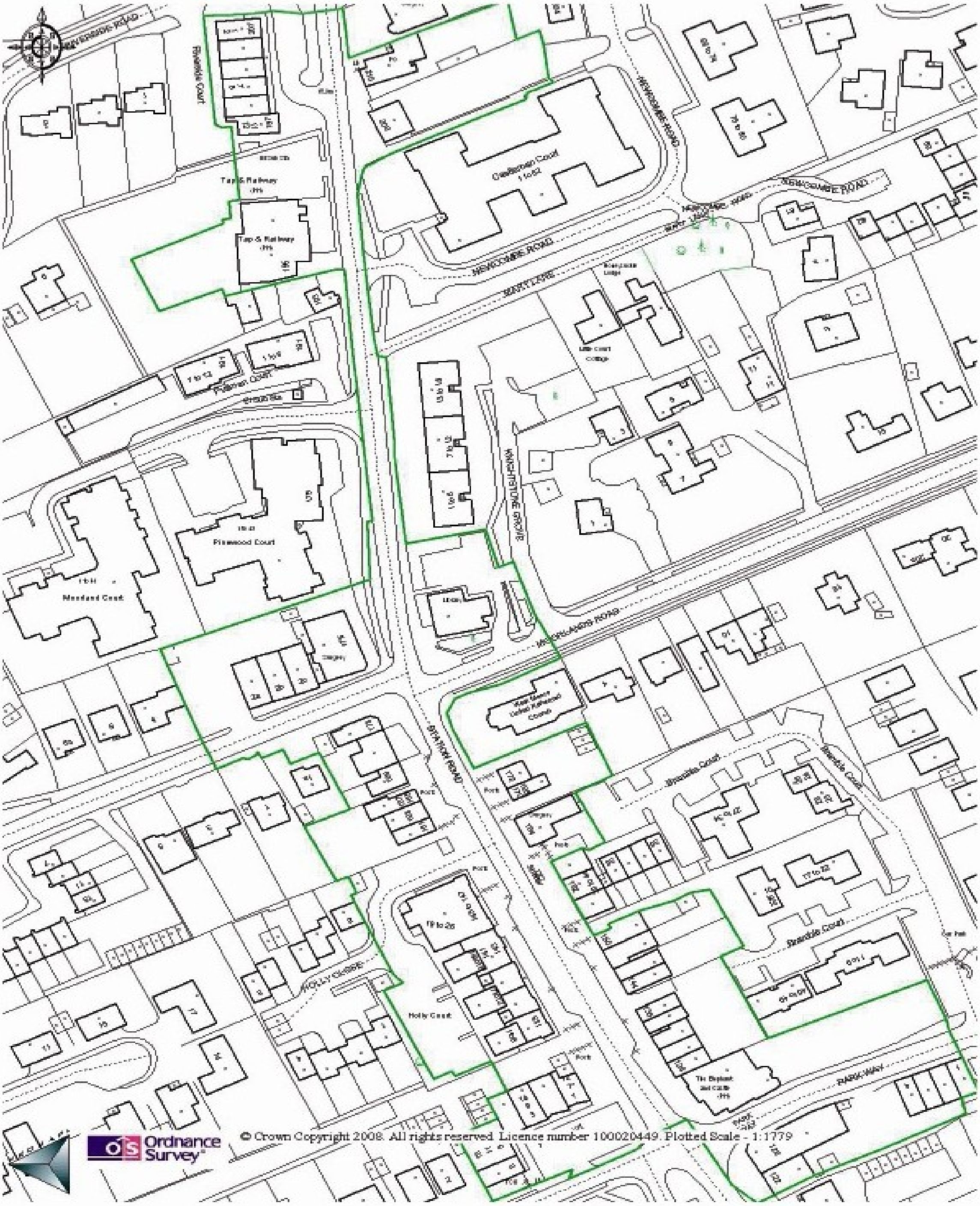
Proposed Secondary Frontage

nlp Nathaniel Lichfield and Partners

Project	Joint Dorset Retail Study
Title	**Wimborne Minster**
Client	East Dorset District Council
Date	March 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30423/11

N

IL30423-11



KEY

Proposed PSA Boundary

nlp Nathaniel Lichfield and Partners

Project	Joint Dorset Retail Study
Title	**West Moors**
Client	East Dorset District Council
Date	March 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30423/05

IL30423-05

KEY

Proposed PSA Boundary

nlp Nathaniel Lichfield and Partners

Project	Joint Dorset Retail Study
Title	**Verwood**
Client	East Dorset District Council
Date	March 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30423-04

N

IL30423-04