Nathaniel Lichfield and Partners

Planning Design Economics

JOINT RETAIL ASSESSMENT

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

VOLUME 2: NORTH DORSET

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Nathaniel Lichfield & Partners Ltd
14 Regent's Wharf
All Saints Street
London N1 9RL

T 020 7837 4477
F 020 7837 2277
london@nlpplanning.com
www.nlpplanning.com

Offices also in:
Cardiff
Manchester
Newcastle upon Tyne

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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 tend 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 North Dorset District.

Content of the Report

1.2 The Study has 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 2 provides an overview of the local planning policy context. Section 3.0 describes existing shopping facilities within North 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.

North Dorset District Wide Local Plan (Review) 2011 (2003)

2.4 Objectives for shopping areas once again follow national planning guidance. Policy 3.15 promotes the vitality of Blandford, Gillingham, Shaftesbury and Sturminster Newton shopping centres to be maintained and promoted.

2.5 Proposals for new Class A1 retail developments will be permitted within areas of primary shopping frontage. Class A2 financial and business services and food and drink proposals will be acceptable within secondary shopping frontage areas providing other relevant policies are met (Policy 3.16). Further the loss of Class A1 retail units will be resisted within the designated areas of primary shopping frontage apart from where the vitality and viability of the area is not prejudiced, there would not be an unacceptable concentration of non-retail uses and the existing frontage is maintained (Policy 3.17).

2.6 The local shopping centres of Marnhull and Stalbridge will be maintained and promoted (Policy 3.18). Further,

> *The change of use of existing retail and service uses will not be permitted where this would cause significant harm to the level of easily accessible convenience facilities demanded by and available to the local community so as to support the principles of sustainability and reduced transport use.*

2.7 Within policy 3.19 out of town centre retail development may be permitted in certain circumstances providing that, following a sequential test, no suitable alternative site would be available within or at the edge of the town centre and providing that the proposal:

- *either by itself or cumulatively with other existing or proposed developments, does not adversely affect the vitality and viability of the town centre;*
- *is accessible by a choice of means of transport and promotes pedestrian and cycleway linkages with the existing town centre;*
- *is of an appropriate scale for the size of the centre; and*
- *is for small neighbourhood centres of not more than 500m^2, (5,400ft^2) net retail floorspace.*

A retail and transport assessment is required for proposals, outside or adjoining the town centre, where the net retail floorspace is greater than 500m^2.

3.0 EXISTING SHOPPING FACILITIES

Convenience Shopping Provision

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

Table 3.1: Existing Convenience Good Shopping Provision in North Dorset

Town/Store	Net Sales Floorspace Sq M
Tesco, Shaftesbury	2,294
Somerfield, Shaftesbury	823
Co-op, The Sycamores, Shaftesbury	184
Other town centre convenience, Shaftesbury	820
Somerfield, Blandford	1,400
Tesco, Blandford	1,860
Other town centre convenience, Blandford	1,100
Waitrose, Gillingham	2,156
Somerfield, Gillingham	743
Lidl, Gillingham	1,000
Gillingham other	340
Southern Co-operatives, Sturminster Newton	349
Sturminster Newton other	575
Stalbridge	1,300
Other local shops in North Dorset	500
Total	**15,444**

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 North Dorset. Blandford is the largest centre in size in terms of comparison floorspace. Shaftesbury and Gillingham are slightly smaller centres.

Table 3.2: Existing Comparison Good Shopping Provision in North Dorset

Location	**Floorspace Gross Sq M**	**Floorspace Net Sales Sq M**
Shaftesbury comparison shops Comparison in food stores, Shaftesbury	7,420 n/a	4,823 888
Blandford comparison shops Comparison in food stores, Blandford	10,670 n/a	6,936 697
Gillingham comparison shops Comparison in food stores, Gillingham	7,056 n/a	4,586 805
Sturminster Newton Comparison in food stores, Sturminster Newton	2,358 n/a	1,533 81
Other local shops North Dorset	n/a	500
Total	**n/a**	**20,848**

Sources: Goad and NLP Site Survey

4.0 BLANDFORD FORUM TOWN CENTRE

Introduction

4.1 Blandford Forum (or Blandford) is an old market town which is located within the south east of North Dorset District Council's area. The majority of the buildings in the centre of the town date from the 18th century, built following a fire which destroyed the majority of the town centre. The result is one of the most complete Georgian town centres in the country. Within the area are a considerable number of important Listed Buildings and the entire town centre is within a Conservation Area. A Conservation Area Partnership with English Heritage and the Heritage Lottery Fund was established in the late 1990's to secure improvements and repairs to buildings and the public realm.

4.2 The surrounding area to the north-east and west falls within the Dorset Downs Area of Outstanding Natural Beauty and the Cranborne Chase and West Wiltshire Area of Outstanding Natural Beauty.

4.3 Blandford is well placed for development as it is on the A350 and A354 giving links to Poole, Bournemouth, Dorchester and Salisbury.

Structure

4.4 The main shopping area of Blandford Forum forms an "L" shape and is concentrated along Salisbury Street and Market Place with Secondary Retail Frontage located along East Street, West Street, White Cliff Mill Street and Salisbury Street. There are also several side streets, such as Greyhound Square, Barnack Walk and Tabernacle Walk and The Plocks, within which shops are also located.

4.5 In terms of access to Blandford Forum, it is easily accessed via 'A' roads. There is no train station within the town centre with the nearest main train station is several miles away in Gillingham, Poole or Dorchester.

Mix of Uses and Occupier Representation

4.6 The main shopping area of Blandford Forum provides:

- Convenience Shopping – including a Spar, butchers, greengrocers, bakers and a health food shop.

- Comparison Shopping – a mix of small unique shops and larger stores such as Woolworths, WH Smith, Argos, Boots and Mackays/M&CO.
- Entertainment and leisure – including public houses, cafes, restaurants and takeaways.
- Services – including banks and financial services.

4.7 Blandford Forum has 187 ground floor non-residential units as shown below. The Town Centre has below the national average proportion of comparison (34.2%) and convenience (5.9%) units whilst services and miscellaneous uses are much higher than the national average at 50.3%.

4.8 The proportion of vacant units (9.6%) is slightly below the national average. The vacant units are clustered within the furthest northern (Salisbury Street) and eastern (East Street) sections of the main shopping area.

Mix of Uses

Table 4.1: Blandford Forum Uses Mix

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Blandford Forum	GB Average %
Comparison Retail	64	34.2	48.3
Convenience Retail	11	5.9	9.4
Services/Misc	94	50.3	31.6
Vacant/Under Construction	18	9.6	10.7
Total	**187**	**100**	**100**

4.9 Blandford Forum does not have a high proportion of convenience outlets. Those that do exist include small bakeries, butchers and greengrocers. However there is a Somerfield to the rear of the main shopping area (south east of East Street) and a Tesco in an edge of centre location to the south of the main shopping area in Blandford St Mary.

4.10 The shops comprise a mixture of local independent traders and some national multiples such as Woolworths, WH Smith, Argos and Mackays. Whilst there is a high majority of independent traders these tend to occupy the smaller shopping units with the national multiples often occupying much larger stores.

4.11 Blandford Forum is a lively town centre with a good provision of services and it appears that local residents are well catered for.

Breakdown of Comparison Shops

Table 4.2: Blandford Forum Comparison Shops

Type of Unit	Blandford Forum		GB
	Number of Units	%	Average (%)
Clothing and footwear	10	15.6	26
Furniture, carpets and textiles	8	12.5	10
Booksellers, arts, craft and stationers	9	14	9
Electrical, games, music, photography	6	9.4	11
DIY, hardware and homewares	2	3.1	6
China, glass, gifts and fancy goods	3	4.7	4
Cars, motorcycles and motor accessories	0	0	3
Chemist, drugstore and opticians	13	20.3	8
Variety, department and catalogue	1	1.6	2
Florists, nurserymen and seedsmen	1	1.6	2
Toys, hobby, cycle and sport	1	1.6	6
Jewellers	2	3.1	5
Other comparison retailers (including charity shops)	8	12.5	8
TOTAL	**64**	**100**	**100**

4.12 Service uses are very high compared to the national average, in particular, banks and other financial services (40.4%) whilst food and drink uses are below the national average (31.9%).

Breakdown of Service Uses

Table 4.3: Blandford Forum Service Uses

Type of use	Blandford Forum		GB Average
	Number of Units	%	%
Restaurants, café, takeaways & pubs	30	31.9	41
Banks and financial and other services	38	40.4	19
Estate Agents and valuers	10	10.6	11
Travel Agents	1	1.1	6
Hairdressers and beauty parlours	13	13.8	19
Laundries and dry cleaners	2	2.1	4
TOTAL	94	100	100

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 The primary and secondary areas were 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).

Table 4.4

Performance	**Primary Area Score (1 to 5)**	**Secondary Area Score (1 to 5)**
Proportion of national multiples	3	2
Quality of national multiples	2	2
Proportion of specialist independent traders	5	4
Quality of specialist independent traders	4	3
Presence of evening economy	4	4

4.15 Within Blandford's primary area the quality and proportion of national multiples is considered to be 'neutral' in comparison to the specialist independent traders which rate well. The secondary area continues this trend with a high proportion of specialist independent traders compared to a much lower number of national multiples. In terms of the quality there is scope for improvement in both areas.

4.16 General evening economy uses are good within the primary area which includes several public houses, bistros and restaurants. Whilst there was a presence of an evening economy within the secondary area this was predominantly in the form of takeaways with the exception of the secondary area along West Street which included a cluster of good quality restaurants, public houses and a hotel. Overall, there is a good presence of an evening economy within both the primary and secondary areas.

Anti-Social Behaviour and Security

4.17 The primary and secondary areas were rated in relation to CCTV coverage, police presence, anti-social behaviour and street lighting. Other issues relevant to anti-social behaviour were also considered but have been analysed in the section on maintenance and cleaning i.e. graffiti, fly-posting and chewing gum.

4.18 During NLP's visit there was no evidence of on-street drinking. There are CCTV cameras in the town centre.

Table 4.5

Performance	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Evidence of begging/on-street drinking	5	5
CCTV coverage/Police presence	3	4
Frequency of street lighting	3	3

Accessibility & Movement

4.19 Factors influencing accessibility and movement around the centre were considered.

Table 4.6

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Location and convenience of car parks	4	4
Pedestrian – vehicular conflict	2	2
Traffic congestion	2	3
Frequency of pedestrian crossings	2	2
Frequency of bus stops	3	3
Quality of bus stops	2	2

4.20 Movement through Blandford Forum town centre raises concerns. The primary area suffers from vehicular congestion more so than the secondary area however both were congested at rush hour. The main road that runs through the primary and secondary area has additional roads joining it at several points within the town centre which contribute to congestion at peak times. Some of the congestion could be avoided if drivers entered the town by the access road nearest to their destination and thus reduced their movements through the town centre. Pedestrian crossings are kept at a minimum in the town centre with numerous raised paving sections allowing pedestrians good access to the retail and business premises.

4.21 Car parks are mainly located on the outskirts of the town centre, located predominantly to the rear of East Street and West Street, only a short walk from the primary and secondary areas. There is a car parking area within the centre of the town (Market Place). This is the area used for the twice weekly market and monthly Farmers Market. On other days there is space for approximately 30 vehicles.

4.22 There is also some provision for on street parking on both sides of the road in some of the town centre, although in the Market Place this is limited to loading only. There is some abuse of this facility which does exacerbate the congestion. In Salisbury Street there is no parking on either side of the road in the southern part of the street. The frequency of buses could be improved around the centre as could the quality of bus stops.

Cleaning and Maintenance

4.23 NLP's own analysis of cleanliness and maintenance of the primary and secondary areas were rated based on six separate factors.

Table 4.7

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Litter and street cleaning	4	4
Chewing gum on pavements	3	3
Fly-posting	4	3
Graffiti	4	3
Maintenance of paving/street materials	3	2
Quality of shop frontage/fascia	3	2

4.24 Blandford Forum rated well in terms of cleanliness within both the primary and secondary area. Chewing gum on pavements, fly-posting and graffiti were rated as being either 'neutral' or 'quite good'. However the appearance of a number of the shop frontages and the maintenance of paving/street materials appear "tired" in places. In the case of the paving this is largely due to mechanical/vehicular damage, although it is recognised that a £1 million enhancement scheme was carried out in the Market Place and Salisbury Street in the late 1990's which involved the replacement of concrete pavers with natural stone which due to its nature is not consistent in appearance..

Quality of the Streetscape and Environment

4.25 The quality of the streetscape and general shopping environment were assessed within the primary and secondary areas, based on 12 separate factors.

4.26 The quality of the streetscape was rated as being of a reasonably low standard within the primary area within Blandford Forum and the secondary area was noticeably worse with most factors rated as either 'quite poor' or 'very poor' (2 and 1 points respectively). However, it must be recognised that this is an important Georgian town centre and as such the introduction of trees, planting, public art and street furnishings may be considered to be inappropriate. The street furniture in the centre has been kept to a minimum in order to reflect the centre's historic character.

Table 4.8

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Quality of paving/street materials	3	2
Quality of street furniture	3	2
Quantity of street furniture	2	2
Quality of public art	2	1
Quality of street signage/maps	4	1
Quantity of street signage/maps	3	1
Quality of design of street lighting	2	1
Attractiveness of commercial properties (inc. upper floors)	3	2
Quality of planting/trees	2	2
Quantity of planting/trees	2	2
Town centre parks and public open spaces	2	2
Street entertainment, events and liveliness	3	2

Property Vacancies

4.27 The number and concentration of shop vacancies were considered. Vacancy levels are low within the primary area however they are higher in number within all of the secondary areas. Vacancies are clustered within the outer edges of the main shopping area a number of which are located close to the Somerfield food store. Some of these vacant units within the secondary area appeared to have been vacant for some time and in need of 'modernisation'. The vacant Morrison's store is a key vacancy in the town.

Table 4.9

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Number of vacant units	4	2
Concentration of vacant units	3	2
Derelict/long term vacant units	4	2

Summary

4.28 The average score for the 35 factors in the primary area was 3.06 (i.e. between 'neutral' and 'quite good') compared with an average score of 2.46 for the secondary areas, which is between 'quite poor' and 'neutral'. Four of the 35 factors (quantity and quality of street signage/maps, quality of design of street lighting and public art) were considered ‘very poor’ within the secondary area, and quite a high number of factors were rated as ‘quite poor’. The primary area, which was improved in the 1990’s, rated much better.

4.29 Overall Blandford Forum town centre is attractive architecturally and is clean and tidy. However, the secondary areas would be helped by improvements. It is recognised that the introduction of planting and street furniture may be inappropriate but high quality paving and other improvements could be considered. The streetscene is lively and there are few vacant units although vehicle congestion can cause problems.

Business Occupiers Survey

4.30 The business occupier surveys are discussed in detail in Chapter 4. However, the key findings for Blandford town centre (for which there was a 35% response rate) were as follows:

- The majority of businesses have been trading in the town for over 10 years (57%) and between 6-10yrs (21%). No businesses had been trading for under one year;
- The majority of businesses are leased (74%) with only 24% of units owner-occupied;
- In terms of plans to change the business, 87% of respondents stated that they had no plans. However, 7% stated their intentions to close or relocate elsewhere within the town centre;
- The current trading performance of Blandford’s businesses varied with 13% stating it was very good, 30% good, 53% satisfactory and 4% poor;
- When asked whether trading performance had improved over the past 2 years there was disagreement with 19% saying it had declined, 36% saying it had stayed the same and 43% stating it had improved;
- The expected 12 month future trading performance was generally positive with 34% expecting improvement and 55% expecting it to stay the same. Only 4% of respondents were expecting a decline in trade;
- The main factors which Blandford’s business respondents believe constrain their performance are high overheads (28%) and the economy in general (43%). The availability and location of car parking was also cited as a constraint by 34% of respondents and the price of parking by 32%;
- The average score awarded to Blandford town centre by businesses was 2.58 which is between poor and neutral with the lowest scoring factors being entertainment and leisure facilities, marketing/promotion/events and traffic congestion.

- 62% of businesses within Blandford stated that the town centre's market position was too down market although 26% of businesses cited it as being fine as it is;
- 49% of business respondents stated that in terms of the shopping/services mix Blandford was about right although 29% felt that there are too many small independent shops and not enough large chain stores;
- The factors seen as the most important future planning issues by businesses were to: remove/reduce traffic congestion (51%), improve public car parking and reduce charges (57%), provide better entertainment and leisure facilities (30%) and improve frequency of bus services (30%).

Blandford SWOT Analysis

4.31 The strategic recommendations for Blandford are set out in Sections 23 and 24, and a review of development opportunities in the centre is summarised in Section 24. The SWOT Analysis of Blandford below is based on NLP's audit of the centre, the household shopper survey results and discussions with Council officers and stakeholders.

Table 4.10: SWOT Analysis

Strengths	**Weaknesses**
• Church area • Arcades	• Lower quality to east of town centre • Traffic congestion • Availability and location of car parking • Low perception of quality
Opportunities	**Threats**
• Interest from national retailers • Vacant Safeway's unit • Public realm enhancements • Greater use of Market Place • Better links with river	• Out-of-town supermarket

5.0 GILLINGHAM TOWN CENTRE

Introduction

5.1 Gillingham has experienced the fastest growth rate of all the towns in North Dorset over the past decade under the Local Plan Strategy and will receive future levels of growth locally significant to Gillingham and its function as a market town. The boundary of the "Gillingham Royal Forest Project" runs close to the eastern built-up limits of the town and, within the Local Plan, it is proposed that this should form the eventual limits of the town in its expansion in this area. Part of the town centre also falls within a Conservation Area and an Area of Local Character.

5.2 The town is located 4 miles North West of Shaftesbury at the junction of the B3095 and B3081 with the A303 trunk road 4 miles away. The town has its own railway station on the Exeter to London line.

Structure

5.3 The primary shopping area of Gillingham is linear in structure and is concentrated along the High Street with shops also extending out along side streets (Station Road, The Square and Queen Street). A Waitrose supermarket located to the south of the High Street acts as an anchor store for the town.

5.4 The town centre is situated between three rivers, one of which cuts through the main shopping area. The shopping units are a mix of styles and designs including 'traditional' buildings and the more recent 60's and 70 planned units. Most of the shopping units are filled by local independent traders.

Mix of Uses and Occupier Representation

5.5 The primary shopping area of Gillingham provides:

- Convenience Shopping – including Somerfield, Lidl, butchers, bakers and greengrocers.
- Comparison Shopping – a number of independent retailers with a limited number of national chains.
- Entertainment and leisure – including public houses and restaurants; and
- Services – including banks, estate agents and other professional services

5.6 Gillingham has 97 ground floor non-residential units as shown below. The town centre is below national average in its provision of comparison (30.3%) and convenience (7.1%) units and has above the national average in service/miscellaneous (51.5%) uses.

5.7 The town centre has slightly above the national average of vacant units (11.1%). Whilst some of the vacant units look like they have been empty for some time these units are to the most part relatively small and are clustered within the north western end of the main shopping street.

Mix of Uses

Table 5.1: Gillingham Use Mix

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Gillingham	GB Average %
Comparison Retail	30	30.3	48.3
Convenience Retail	5	7.1	9.4
Services/Misc	51	51.5	31.6
Vacant/Under Construction	11	11.1	10.7
Total	**97**	**100**	**100**

Breakdown of Comparison Shops

Table 5.2: Gillingham Comparison Shops

Type of Unit	Gillingham		GB Average (%)
	Number of Units	%	
Clothing and footwear	3	10	26
Furniture, carpets and textiles	3	10	10
Booksellers, arts, craft and stationers	3	10	9
Electrical, games, music, photography	4	13.3	11
DIY, hardware and homewares	3	10	6
China, glass, gifts and fancy goods	3	10	4
Cars, motorcycles and motor accessories	2	6.7	3
Chemist, drugstore and opticians	6	20	8
Variety, department and catalogue	0	0	2
Florists, nurserymen and seedsmen	1	3.3	2
Toys, hobby, cycle and sport	1	3.3	6
Jewellers	1	3.3	5
Other comparison retailers (including charity shops)	0	0	8
TOTAL	**30**	**100**	**100**

5.8 The proportion of gift shop units, chemists and hardware stores are above the national average in Gillingham whilst clothing and footwear, toy and hobby shops and jewellery shops are below the national average. No department or variety stores are located in the search area.

5.9 The proportion of service uses, in particular, banks and financial services (43.1%) is significantly higher than the national average (19%). In contrast, the proportion of restaurants, cafes, takeaways and public houses (23.5%) is considerably below the national average (41%).

Breakdown of Service Uses

Table 5.3: Gillingham Service Mix

Type of use	Gillingham		GB Average
	Number of Units	**%**	**Number of Units**
Restaurants, café, takeaways & pubs	12	23.5	12
Banks and financial and other services	22	43.1	22
Estate Agents and valuers	9	17.6	9
Travel Agents	0	0	0
Hairdressers and beauty parlours	7	13.7	7
Laundries and dry cleaners	1	2	1
TOTAL	**51**	**100**	**51**

Town Centre Audit

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

Trade Mix

5.11 The quality of both national multiples and specialist independent traders is rated as being moderate within both the primary and secondary areas however there are far more specialist independent traders compared to the number of national multiples. In terms of quality there is scope for improvement i.e. the number of quality fashion retailers is very limited.

5.12 Within the secondary areas the presence of a general evening economy comes across as better than that of the primary area.

Table 5.4

Performance	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Proportion of national multiples	2	1
Quality of national multiples	3	3
Proportion of specialist independent traders	5	4
Quality of specialist independent traders	3	3
Presence of evening economy	2	4

Anti-Social Behaviour and Security

5.13 There was no evidence of on-street drinking within the primary or secondary areas however there was some begging found within the primary area outside the Somerfield food store. Use of any CCTV coverage and police presence was not noticed throughout the centre. Overall Gillingham was considered quite safe although it is considered that the area outside the Somerfield food store could be improved.

Table 5.5

Performance	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Evidence of begging/on-street drinking	4	5
CCTV coverage/Police presence	2	2
Frequency of street lighting	3	3

Accessibility & Movement

5.14 The linear structure of the centre along with the volumes of traffic in an area peppered with speed bumps and with a relatively low frequency of pedestrian crossings causes some conflict between vehicles and pedestrians. The traffic calming implemented to slow down vehicle speeds, has resulted in a tendency at times for continuous queues of traffic to build up with few gaps in which pedestrians can cross. Pedestrians and vehicular flows were busiest in close proximity to the supermarkets and their adjoining car parks. The remaining car parking areas and shopping units located further west, away from Somerfield and Lidl, were considerably quieter.

5.15 Road links are reasonable and the centre benefits from a rail link. However, pedestrian access to and from the train station from the main shopping area is not particularly good as, although the station is within 300 meters of the town centre, the journey is divided by the physical barrier of the high street by-pass road. There was some concern that pedestrians may feel intimidated by having to walk past Station

Road Industrial Estate which does not have a lively frontage and suffers from lack of natural surveillance, especially in the dark.

5.16 In terms of car parking the secondary and primary areas are well served with the majority of the car parks being located off the High Street and off Newbury, to the east of the high street. It is noted that one of these car parks adjoins the Somerfield food store and another adjoins Lidl's. There is also provision for on-street parking on both sides of the High Street which contributes to some extent to congestion problems and increases the conflict between vehicular and pedestrian movement. The frequency of bus stops is moderate within the primary and secondary areas yet the quality of the bus stops faired better in the primary areas compared to those in the secondary areas.

Table 5.6

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Location and convenience of car parks	4	4
Pedestrian – vehicular conflict	3	3
Traffic congestion	3	4
Frequency of pedestrian crossings	2	2
Frequency of bus stops	3	3
Quality of bus stops	4	2

Cleaning and Maintenance

5.17 Gillingham is rated highly in terms of cleanliness and maintenance within the primary and secondary areas. All factors were rated as either neutral or better except for the maintenance of paving/street materials within the secondary areas which needed improving. Whilst this was the case for most of the secondary areas this is not the case within the Conservation Area, which was on the whole of a good quality. The appearance of many shop frontages was reasonable although there is room for improvements within both the secondary and primary areas in accordance with the North Dorset guide to shopfront design.

Table 5.7

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Litter and street cleaning	4	4
Chewing gum on pavements	3	3
Fly-posting	4	4
Graffiti	4	4
Maintenance of paving/street materials	3	2
Quality of shop frontage/fascia	3	3

Quality of the Streetscape and Environment

5.18 Pavements are often narrow adding to a feeling of congestion. Street furniture and planting is sparse which was potentially due to the limited public space. The quality of the streetscape was rated as being of a reasonably low standard within both the primary and secondary areas, with most factors rated as 'neither good nor bad' or 'quite poor'. (3 and 2 points respectively). However, the quality of the streetscape within the secondary area to the west of the town centre (The Square), which is protected by Conservation Area status, was generally considered to be better than in the primary area.

5.19 Whilst there are buildings of considerable architectural merit scattered along the High Street, such as Gillingham Methodist Church, the general streetscape based on our 12 separate factors rated poorly and could benefit from improvements.

Table 5.8

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Quality of paving/street materials	2	3
Quality of street furniture	2	4
Quantity of street furniture	2	2
Quality of public art	1	1
Quality of street signage/maps	3	1
Quantity of street signage/maps	3	1
Quality of design of street lighting	3	3
Attractiveness of commercial properties (inc. upper floors)	3	3
Quality of planting/trees	2	2
Quantity of planting/trees	2	2
Town centre parks and public open spaces	2	3
Street entertainment, events and liveliness	3	2

Property Vacancies

5.20 The number and concentration of shop vacancies was considered to be quite poor within both the primary and secondary areas, albeit slightly worse in the primary area where a cluster of vacant shops existed west of the river and opposite a car park and public toilets.

Table 5.9

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Number of vacant units	2	2
Concentration of vacant units	2	4
Derelict/long term vacant units	3	3

Summary

5.21 The average score for the 35 factors in the primary area was 2.83 (i.e. between ‘neutral’ and ‘quite poor’) with the same average of 2.83 for the secondary area. The provision of public art and the quality and provision of street signage/maps is poor in both the secondary and primary areas.

Business Occupiers Survey

5.22 The business occupier surveys are discussed in detail under Chapter 4. However, the key findings for Gillingham town centre (for which there was a 36% response rate) were as follows:

- The majority of businesses have been trading in the town for over 10 years (57%) and between 3-5yrs (29%). 2% of businesses had been trading for under one year;
- The majority of businesses are leased (75%) with only 23% of units owner-occupied;
- In terms of plans to change the business, 75% of respondents stated that they had no plans. However, 12% stated their intentions to either close or relocate out of the town centre;
- The current trading performance of Gillingham’s businesses varied with 14% stating it was very good, 46% good, 29% satisfactory and 11% poor;
- When asked whether trading performance had improved over the past 2 years there was disagreement with 14% saying it had declined, 36% saying it had stayed the same and 48% stating it had improved;

- The expected 12 month future trading performance was generally positive with 54% expecting improvement and 39% expecting it to stay the same. Only 5% of respondents were expecting a decline in trade;

- The main factors which Gillingham businesses believe constrain their performance is high overheads (27%) and the economy in general (36%). The availability and location of car parking was also cited as a constraint by 23% of respondents as was the quality and size of premises;

- The average score awarded to Gillingham town centre by businesses was 2.34 which is between neutral and poor with the lowest scoring factors being range of shops and services, entertainment and leisure facilities, liveliness and character, the market and the general shopping environment (all scoring <2);

- 64% of businesses within Gillingham stated that the town centre was too down market;

- 61% of business respondents stated that in terms of the shopping/services mix Gillingham has too many small independent shops and not enough large chain stores. However 23% also commented that there aren't enough small independent shops;

- The factors seen as the most important future planning issues by businesses were to: increase the range of national multiple/chain stores (45%), improve quality of shops and services (39%), improve public car parking and reduce charges (39%) and improve better entertainment and leisure (39%).

Gillingham SWOT Analysis

5.23 The strategic recommendations for Gillingham are set out in Section 10.0, and a review of development opportunities in the centre is summarised in Section 9.0. The SWOT Analysis of Gillingham below is based on NLP's audit of the centre, the household shopper survey results and discussions with Council officers and stakeholders.

Table 5.10: Gillingham SWOT Analysis

<table>
<tr><td>Strengths
• Three town centre supermarkets
• Key listed buildings
• Good transport links</td><td>Weaknesses
• Above average vacancy rate
• Small units
• Low perception of quality
• Unsympathetic modern development
• Lack of national retailers
• Lack of entertainment/leisure facilities
• Poor linkages between town centre and Waitrose</td></tr>
<tr><td>Opportunities
• Increased population</td><td>Threats
• Increased traffic</td></tr>
</table>

6.0 SHAFTESBURY TOWN CENTRE

Introduction

6.1 Shaftesbury has a medieval town centre with a history reaching back to 800AD. It is the main shopping and service centre for the surrounding area providing educational, health and recreational facilities and has been selected as a town for major growth on the main integrated transport network within the Local Plan.

6.2 Shaftesbury is located halfway between Blandford Forum and Warminster on the A350, 7 miles south of the A303. The nearest railway station is located at Gillingham which is 4 miles north west of Shaftesbury.

6.3 The hilltop location of the town restricts its growth as does its proximity to "The Cranborne Chase & West Wiltshire Area of Outstanding Natural Beauty" (designated by the Countryside Commission in 1983) and its historic medieval structure.

Structure

6.4 The shopping area of Shaftesbury winds down the hillside and is concentrated along the High Street and Bell Street with some shops located on side streets (inc. Mustons Lane, Swan Yard and Church Lane). The prime pitch is located along the High Street, between Gold Hill (near the Town Hall) and Mustons Lane. The Principal and Secondary Retail Frontages are identified on the proposals map of the Local Plan. There is a weekly market held on Thursdays in the High Street. A Tesco store has good pedestrian linkages with the main shopping area but is not considered to be part of it.

6.5 The town centre, which is one of the oldest towns in England, curves down the hillside. It falls within a conservation area containing several listed buildings resulting in a town centre full of historical character but struggling to cope with increased traffic congestion due to the size and layout of the road system within the main high street. The majority of the shopping units are in “traditional” buildings occupied by predominantly local independent traders, selling gifts and fancy goods, rather than national multiples

6.6 Whilst there are car parks from which the town centre can be easily accessed these car parks have a limited capacity and are very busy. There are some off street parking spaces along the main street although the historic street pattern and building layout is such that the opportunity for off street parking is very limited.

Mix of Uses and Occupier Representation

6.7 The main shopping area of Shaftesbury provides:

- Convenience Shopping – including a Somerfield, bakers, butchers, greengrocers.
- Comparison Shopping – a limited number of national chain shops and a large percentage of independent retailers.
- Entertainment and leisure – public houses, restaurants and a museum.
- Services – including banks, estate agents and travel agents.

6.8 Shaftesbury has 115 ground floor non-residential units as shown below. The percentage of convenience retail and services/miscellaneous uses within Shaftesbury Town Centre is above the national average. Comparison units and services (equating to 81.7% in total) form a high proportion of the Town Centre.

6.9 The percentage of vacant units is nearly 4% less than the national average at 7% and the majority of vacant units do not appear to have been vacant for a long period of time.

Mix of Uses

Table 6.1: Shaftesbury Uses Mix

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Shaftesbury	GB Average %
Comparison Retail	43	37.4	48.3
Convenience Retail	13	11.3	9.4
Services/Misc.	51	44.3	31.6
Vacant/Under Construction	8	7	10.7
Total	**115**	**100**	**100**

6.10 Shaftesbury has a large number of convenience stores compared to the national average with butchers, bakers and a Somerfield within the Town Centre and a Tesco also in walking distance but not within the main shopping area.

Breakdown of Comparison Shops

Table 6.2: Shaftesbury Comparison Shops

Type of Unit	Shaftesbury		GB Average (%)
	Number of Units	%	
Clothing and footwear	8	18.6	26
Furniture, carpets and textiles	1	2.3	10
Booksellers, arts, craft and stationers	2	4.7	9
Electrical, games, music, photography	0	0	11
DIY, hardware and homewares	3	7	6
China, glass, gifts and fancy goods	15	34.9	4
Cars, motorcycles and motor accessories	1	2.3	3
Chemist, drugstore and opticians	7	16.3	8
Variety, department and catalogue	2	4.7	2
Florists, nurserymen and seedsmen	1	2.3	2
Toys, hobby, cycle and sport	1	2.3	6
Jewellers	1	2.3	5
Other comparison retailers (including charity shops)	1	2.3	8
TOTAL	**43**	**100**	**100**

6.11 The proportion of gift shops (34.9%) is well above the national average (4%) as is the proportion of chemists, opticians, hardware and homeware stores. The proportion of clothing and footwear shops, furniture shops and booksellers, for instance, are below the national average. No shop units sell predominantly electrical goods.

6.12 The centre has a high proportion of service uses with a higher than national average proportion of financial services and estate agents but a lower than average proportion of food and drink establishments.

Breakdown of Service Uses

Table 6.3: Shaftesbury Service Mix

Type of use	Shaftesbury		GB Average
	Number of Units	%	%
Restaurants, café, takeaways & pubs	16	31.4	41
Banks and financial and other services	20	39.2	19
Estate Agents and valuers	6	11.8	11
Travel Agents	2	3.9	6
Hairdressers and beauty parlours	7	13.7	19
Laundries and dry cleaners	0	0	4
TOTAL	**51**	**100**	**100**

6.13 Vacancy rates are low with a good range of shops and services catering for locals and tourists. The mix of shops and services suggests the town benefits from tourism trade, e.g. gift and fancy goods shops.

Town Centre Audit

6.14 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

6.15 The number and quality of national multiples has been given a low rating within both the primary and secondary areas. There is scope for improvement in terms of the provision within the town centre of national multiples that are of a good quality. In contrast, the number and quality of specialist independent traders is high within both the primary and secondary areas.

6.16 The general evening economy within the primary area consisted of a scattering of 'traditional' public houses, cafes, restaurants and a couple of takeaways whilst the secondary area showed no real presence of an evening economy.

Table 6.4

Performance	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Proportion of national multiples	2	1
Quality of national multiples	3	1
Proportion of specialist independent traders	5	5
Quality of specialist independent traders	5	4
Presence of evening economy	3	1

Anti-Social Behaviour and Security

6.17 There was no evidence of begging/on street drinking within the town centre and there was a 'neutral' level of CCTV coverage and police presence throughout the centre. Overall, Shaftesbury was considered to have a very good feeling of safety.

Table 6.5

Performance	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Evidence of begging/on-street drinking	5	5
CCTV coverage/Police presence	3	2
Frequency of street lighting	3	2

Accessibility and Movement

6.18 The town centre enhancement scheme has been designed to reduce conflict between vehicles and pedestrians. This will be extended into Coppice Street and Salisbury Street following consultation with the local community and will be designed to improve links with the Tesco site.

6.19 There are two main car parks in close proximity to the town centre. However, the larger of the two car parks which is located next to the Somerfield food store (off Bell Street) suffers from congestion at peak times. The High Street and Bell Street have some provision for on-street parking on both sides of the road. This contributes to congestion and causes further conflict between pedestrians and vehicles.

Table 6.6

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Location and convenience of car parks	3	3
Pedestrian – vehicular conflict	2	4
Traffic congestion	2	4
Frequency of pedestrian crossings	2	2
Frequency of bus stops	4	2
Quality of bus stops	3	2

Cleaning and Maintenance

6.20 Shaftesbury was rated well in nearly all the categories relating to cleaning and maintenance, particularly within the primary area. All factors in the primary area were rated as ‘quite good’ or ‘very good’. The secondary area did not rate as well as the primary area in terms of the maintenance of paving/street materials and the quality of shop frontage/fascia. In general Shaftesbury town centre appears to the most part to be very well maintained, with new paving and well looked after shop frontages etc., however the secondary area could be improved.

Table 6.7

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Litter and street cleaning	5	5
Chewing gum on pavements	4	4
Fly-posting	4	4
Graffiti	4	4
Maintenance of paving/street materials	4	3
Quality of shop frontage/fascia	4	3

Quality of the Streetscape and Environment

6.21 The quality of the streetscape and general shopping environment is good within the primary area although there is a considerable drop in ratings for the secondary area. However, the secondary area is very small and is due to be upgraded in the next phase of the town centre enhancement. Significant investment has been spent in improving the primary area and this has a positive impact on the streetscape and environment i.e. new quality paving. The street furniture, whilst limited is quite good quality and shops are well maintained. Areas of public open space have recently been improved, with the provision of some planters agreed. The provision of public art is limited in the town centre.

6.22 Overall, the general streetscape in Shaftesbury High Street is considered to be attractive and inviting.

Table 6.8

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Quality of paving/street materials	5	3
Quality of street furniture	4	1
Quantity of street furniture	2	1
Quality of public art	2	1
Quality of street signage/maps	3	1
Quantity of street signage/maps	3	1
Quality of design of street lighting	4	3
Attractiveness of commercial properties (inc. upper floors)	4	3
Quality of planting/trees	2	1
Quantity of planting/trees	2	1
Town centre parks and public open spaces	2	1
Street entertainment, events and liveliness	4	1

Property Vacancies

6.23 Vacancy levels were not high within either the primary or the secondary areas at the time of assessment and the buildings that were vacant did not appear to have been vacant for a long time nor were they concentrated in one particular area.

Table 6.9

Factor	Primary Area Score (1 to 5)	Secondary Area Score (1 to 5)
Number of vacant units	3	4
Concentration of vacant units	4	4
Derelict/long term vacant units	4	3

Summary

The average score for the 35 factors in the primary shopping area within Shaftesbury was 3.37 (i.e. between 'neutral' and 'quite good') compared with an average score of 2.57 (i.e. between 'neutral' and 'quite poor') in the secondary area. Several of the 35 factors were considered to be 'very poor' within the secondary area however the primary area did not have any 'very poor' ratings and fared much better with several factors rated as 'very good'.

Overall Shaftesbury town centre is an attractive and exciting town centre, which is well maintained, however there is scope for improvement in some areas, particularly within the secondary area. Environmental improvements have taken place in the primary area which helps to maintain the quality of the town centre environment.

Business Occupiers Survey

6.24 The business occupier surveys are discussed in detail under Chapter 4. However, the key findings for Shaftesbury town centre (for which there was a 30% response rate) were as follows:

- The majority of businesses have been trading in the town for over 10 years (73%) and between 6-10yrs (17%). No businesses had been trading for under one year;
- The majority of businesses are leased (65%) with only 28% of units owner-occupied;
- In terms of plans to change the business, 83% of respondents stated that they had no plans. However, 7% have stated their intentions to close or relocate out of the town centre;

- The current trading performance of Shaftesbury's businesses varied with 14% stating it was very good, 17% good, 52% satisfactory and 10% poor;

- When asked whether trading performance had improved over the past 2 years there was disagreement with 31% saying it had declined, 24% saying it had stayed the same and 45% stating it had improved;

- The expected 12 month future trading performance was generally positive with 31% expecting improvement and 52% expecting it to stay the same;

- The main factors which Shaftesbury businesses believe constrain their performance is the general economy (38%), the price of car parking (38%) and the availability and location of car parking (48%);

- The average score awarded to Shaftesbury town centre by businesses was 2.74 which is between neutral and poor with the lowest scoring factors being traffic congestion, bus service and entertainment and leisure facilities (all scoring <2).

- 76% of businesses within Shaftesbury stated that the town centre's market position was fine as it is although 7% of businesses cited it as being too down market and a further 7% stated that there were too many charity shops.

- 72% of business respondents stated that in terms of the shopping/services mix Shaftesbury was considered to be about right although 24% felt that there are not enough small independent shops;

- The three factors seen as the most important future planning issues by businesses were to: increase the range of local/speciality retailers (38%), remove/reduce traffic congestion and improve car parking availability and reduce charges (55%).

Shaftesbury SWOT Analysis

6.25 The strategic recommendations for Shaftesbury are set out in Section 10, and a review of development opportunities in the centre is summarised in Section 9. The SWOT Analysis of Shaftesbury below is based on NLP's audit of the centre, the household survey results and discussions with Council officers and stakeholders.

Table 6.10: Shaftesbury SWOT Analysis

Strengths • Attractive environment • Town centre supermarket • Tourist visitors • Recent public realm upgrade	**Weaknesses** • Pedestrian/vehicle conflict • Traffic congestion • Lack of depth to retail offer • Availability of car parking
Opportunities • Interest from national retailers	**Threats** • Possible over reliance on tourist trade • Small units unsuitable for many retailers

7.0 STURMINSTER NEWTON TOWN CENTRE

Introduction

7.1 Sturminster Newton is an old market town situated in the heart of rural Dorset between Yeovil and Blandford Forum. It is the smallest of the 4 town centres by population (3,520 in mid 2004). The town has experienced major change, the most recent being the closure of the cattle market in 1997 and the closure of the creamery in 2000. The former cattle market site has recently been developed. The developments include residential development, a community centre, The Exchange, and a new Co-Operative food store.

Structure

7.2 The shopping area of Sturminster Newton is concentrated along Market Place and Market Cross. The centre is relatively compact and there are no distinct primary and secondary areas.

7.3 There are redevelopment opportunities within the town centre. The Station Road site (former Creamery) is identified for employment uses in the Local Plan. However, the Employment Land Review suggests this site is suitable for mixed use development, which would compliment the Cattle Market Scheme.

Mix of Uses and Occupier Representation

7.4 The mix of uses within the town centre closely matches the national average for convenience and vacant units. The proportion of comparison units is lower than the national average and the proportion of service uses is correspondingly higher than the average.

Table 7.1: Sturminster Newton Uses Mix

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Sturminster Newton	GB Average %
Comparison Retail	17	31.0	48.3
Convenience Retail	6	10.9	9.4
Services/Misc	27	49.1	31.6
Vacant/Under Construction	5	9.1	10.7
Total	**55**	**100**	**100**

7.5 The range of comparison units within the town is relatively limited with a number of categories of goods not represented in the town. The mix therefore bears little relationship to the national average.

Breakdown of Comparison Shops

Table 7.2: Sturminster Comparison Shops

Type of Unit	Sturminster Newton		GB
	Number of Units	%	Average (%)
Clothing and footwear	3	17.6	26
Furniture, carpets and textiles	3	17.6	10
Booksellers, arts, craft and stationers	1	5.9	9
Electrical, games, music, photography	2	11.8	11
DIY, hardware and homewares	0	0	6
China, glass, gifts and fancy goods	2	11.8	4
Cars, motorcycles and motor accessories	0	0	3
Chemist, drugstore and opticians	3	17.6	8
Variety, department and catalogue	0	0	2
Florists, nurserymen and seedsmen	0	0	2
Toys, hobby, cycle and sport	0	0	6
Jewellers	0	0	5
Other comparison retailers (including charity shops)	3	17.6	8
TOTAL	**17**	**100**	**100**

Breakdown of Service Uses

Table 7.3: Sturminster Service Mix

Type of use	Sturminster Newton		GB Average
	Number of Units	%	%
Restaurants, café, takeaways & pubs	9	39.1	41
Banks and financial and other services	5	21.7	19
Estate Agents and valuers	4	17.4	11
Travel Agents	1	4.3	6
Hairdressers and beauty parlours	3	13.0	19
Laundries and dry cleaners	1	4.3	4
TOTAL	**23**	**100**	**100**

7.6 The overall proportion of service uses within the town closely matches the national average although there are a higher than average proportion of estate agents and conversely a lower than average proportion of hairdressers/beauty parlours.

Town Centre Audit

7.7 As part of the study each of the towns were audited based on 15 factors and awarded a score from 1 (being very poor) to 5 (being very good).

Trade Mix

7.8 The town centre 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).

Table 7.4

Performance	Primary Area Score (1 to 5)
Proportion of national multiples	1
Quality of national multiples	1
Proportion of specialist independent traders	3
Quality of specialist independent traders	3
Presence of evening economy	2

7.9 Sturminster has no national retail representation other than banks and accordingly is awarded a low score for this criterion. Whilst the proportion of independent retailers is high, the products and services are not particularly specialist and do not have a wide draw. Evening economy uses are fairly limited with only 2 pubs and some takeaways.

Anti-Social Behaviour and Security

7.10 The primary area was rated in relation to CCTV coverage, police presence, anti-social behaviour and street lighting. Other issues relevant to anti-social behaviour were also considered but have been analysed in the section on maintenance and cleaning i.e. graffiti, fly-posting and chewing gum.

Table 7.5

Performance	Primary Area Score (1 to 5)
Evidence of begging/on-street drinking	5
CCTV coverage/Police presence	3
Frequency of street lighting	3

7.11 During NLP's visit there was no evidence of on-street drinking and although CCTV coverage was not obvious there was a general feeling of security within the centre.

Accessibility and Movement

7.12 Factors influencing accessibility and movement around the centre were considered and results are shown below.

7.13 Vehicular and pedestrian movement through the town centre is constrained by the narrowing of roads and pavements by Market House. This in turn leads to congestion.

Table 7.6

Factor	**Primary Area Score (1 to 5)**
Location and convenience of car parks	3
Pedestrian – vehicular conflict	2
Traffic congestion	2
Frequency of pedestrian crossings	2

7.14 The town's main car park is located to the north west of the centre and is therefore not well related to the southern end of the town centre. During the NLP visit the car park had good availability although local stakeholders have described the car parking in the town as problematic due in part to all day parking by commuters.

Property Vacancies

7.15 The number and concentration of shop vacancies were considered**.** Vacancy levels are average around the town centre and were spread out across the centre. None appeared to be long term vacant units.

Table 7.7

Factor	**Primary Area Score (1 to 5)**
Number of vacant units	3
Concentration of vacant units	4
Derelict/long term vacant units	4

Summary

7.16 The average score for the 15 factors in the town centre was 2.7 (i.e. between 'neutral' and 'quite good') Two of the 15 factors (quantity and quality of national multiple retailers) were considered 'very poor' (one point).

7.17 Overall Sturminster Newton town performs the role one would expect for a town of its size, however, greater use could be made of its assets through better traffic management and improved parking regime.

Business Occupiers Survey

7.18 The business occupier surveys are discussed in detail under Chapter 4. However, the key findings for Sturminster town centre (for which there was a 29% response rate) were as follows:

- The majority of businesses have been trading in the town for over 10 years (57%). 4% of businesses have been trading for under one year;
- The majority of businesses are leased (62%) with only 23% of units owner-occupied;
- In terms of plans to change the business, 73% of respondents stated that they had no plans. However, 7% stated their intentions to close or relocate out of the town centre;
- The current trading performance of West Moor's businesses varied with 8% stating it was very good, 27% good, 35% satisfactory and 19% poor;
- When asked whether trading performance had improved over the past 2 years there was disagreement with 23% saying it had declined, 35% saying it had stayed the same and 27% stating it had improved;
- The expected 12 month future trading performance was generally positive with 38% expecting improvement and 27% expecting it to stay the same;
- The main factors which Sturminster businesses believe constrain their performance is high overheads (31%) and the economy in general (31%). The availability and location of car parking was also cited as a constraint by 46% of respondents;
- The average score awarded to Sturminster town centre by businesses was 2.78 which is between neutral and poor with the lowest scoring factors being availability of parking, traffic congestion and bus service (scoring 2 or lower).
- 46% of businesses within Sturminster stated that the town centre's market position was fine as it is although 23% of businesses cited it as being too down market;
- 31% of business respondents stated that in terms of the shopping/services mix Sturminster was about right although 38% commented that there are not enough small independent shops and 12% stated that there were too many small 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 (35%),

remove/reduce traffic congestion (54%) and improve car parking availability and reduce parking charges (62%).

Sturminster Newton SWOT Analysis

7.19 The strategic recommendations for Sturminster Newton are set out in Section 10, and a review of development opportunities in the centre is summarised in Section 9 and Appendix A. The SWOT Analysis of Sturminster Newton below is based on NLP's audit of the centre, the household shopper survey results and discussions with Council officers and stakeholders.

Table 7.8: Sturminster Newton SWOT Analysis

Strengths • New town centre Co-op development • Attractive Market Cross	**Weaknesses** • Pedestrian vehicle conflict • Limited retail offer • Availability/location of Car parking
Opportunities • Town centre residential development • Redevelopment of the Station Road site (former Creamery)	**Threats** • Increased traffic congestion

8.0 OTHER LOCAL CENTRES

Stalbridge District Centre

8.1 Stalbridge is situated in the south west of the District. The centre is linear in nature and has a number of independent small retail and service units. The structure of the centre however, is weakened by a number of residential buildings along the High Street, many of which have been converted from former shop units.

8.2 The centre has recently been strengthened by the opening of a new modern independent supermarket Dye and Sons, which formally had a small presence on the High Street. The supermarket has 90 parking spaces which will be of benefit to the centre as a whole, which, with a narrow High Street cannot easily accommodate on-street car parking. It is likely that the new supermarket will increase footfall in the High Street and increase demand in some of the vacant shop units.

Marnhull

8.3 Marnhull is a dispersed settlement with no clear village centre. There is a small convenience store, pharmacy and garage. However in retail policy terms, it does not meet the criteria of a local centre.

9.0 SCOPE FOR ACCOMMODATING GROWTH

Floorspace Projections

9.1 The floorspace projections set out in the 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 42 vacant shop units within North Dorset, a vacancy rate of 9.3%, compared with the national vacancy rate of 10.7%. There could be scope to reduce the vacancy rate. If the vacancy rate is reduced to about 5% then about 1,900 sq m gross could be reoccupied in North Dorset (100 sq m per unit).

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. 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
North Dorset	2,000 – 3,000 sq m	5,700 – 7,600 sq m	8,850 – 12,200 sq m

9.7 In total between 8,350 to 12,200 sq m gross of retail floorspace could be required by 2016, which represents a 16% to 22% increase in existing floorspace. The top end of the range could be supported if the higher house completion rates 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.

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

Potential Development Opportunities

9.9 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.

9.10 Having identified the scope for new development within the local authority areas, 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.

9.11 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.

9.12 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.

9.13 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.

9.14 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 North Dorset

9.15 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 A, and is summarised in Table 9.2.

Table 9.2: North Dorset Site Evaluation Summary

Site	Potential Scale Retail/Leisure Development	Potential Availability	Overall Development Potential
Shaftesbury			
SHAFT 1 – Cattle Market	Large scale (3,500 sq m gross)	Short term	Good
SHAFT 2 – Postal Sorting Office	Small scale (up to 1,000 sq m gross)	Medium term	Reasonable
Blandford			
BLAND 1 – Vacant Morrisons	Medium scale (1,900 sq m gross)	Short term	Good
BLAND 2 – Stour House	Medium scale (up to 2,500 sq m gross)	Medium term	Reasonable
Gillingham			
GILL 1 – Land at Station Road	Small Scale (up to 1.000 sq m if part of a mixed use development. Large scale (up to 6,000 sq m gross) is solely developed for retail	Medium term	Good

9.16 Within North Dorset six potential development opportunities have been identified which all have reasonable to good potential to deliver additional retail/leisure floorspace.

9.17 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 North Dorset as a whole is up to 9,850 – 18,200 sq m gross up to 2016.

9.18 Short to medium term opportunities in the District are capable of accommodating around 10,000 sq m gross of Class A1 to A5 floorspace, which is within the floorspace projection range identified. With vacant shops units these opportunities could, if delivered, meet the identified need for retail floorspace in the District.

9.19 The Council needs to investigate the potential availability of these sites 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 and district 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. There may be scope to accommodate 1,900 sq m gross if the vacancy rate can be reduced to 5%.

10.5 The retail capacity analysis in this 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 It is recommended that the strategy for accommodating growth in North Dorset should be based on maintaining existing market shares, and reducing the existing level of shop vacancies.

10.7 On this basis the greatest identified capacity for convenience goods is within Blandford. The qualitative evidence suggests that the Tesco's store is trading strongly above its company average and that there are some problems associated with in-store and car park congestion at peak times. The quantitative capacity could be met through a combination of an extension to the existing Tesco store and the reoccupation of the Morrisons supermarket.

10.8 The quantitative need for additional floorspace within Sturminster Newton is limited and site allocations are not required. The reuse of vacant premises and conversion of other properties within the PSA boundary will be able to accommodate growth to 2016.

10.9 Within Gillingham there is a need for new comparison goods floorspace, and the GH 10 local plan allocation should be retained to accommodate this need. The Council may need to consider the use of compulsory purchase powers to bring the development forward.

10.10 In Shaftesbury the need for new floorspace is generally generated by comparison goods expenditure growth. The historic town centre is generally constrained, with only the Postal Sorting office offering limited potential for redevelopment. The site adjacent to Tesco's car park offers the potential to accommodate large format units. This site could therefore be allocated for large format stores including retail warehouses selling bulky goods, which would meet a qualitative need for such retailing in the north of the district.

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 North Dorset

Centre	Current Designation	Number of Outlets	Number of Comparison Shops
Shaftesbury	Town centre	119	47
Gillingham	Town centre	99	32
Blandford	Town centre	195	72
Sturminster Newton	Town centre	55	17
Stalbridge	District centre	18	7
Marnhull	Local centre	2	0

10.17 In our view Shaftesbury, Blandford, Gillingham and Sturminster Newton all meet the PPS6 description of town centres. These centres have over 50 commercial outlets (Class A1 to A5), including a range of convenience, comparison and service uses. However, it is questionable as to whether all the centres serve extensive catchment areas, as stated in the PPS6 definition. The four centres each serve a fairly localised area, particularly for comparison goods, with the nearby larger centres of Salisbury, Yeovil and Poole exerting a strong influence over the catchment area shopping patterns.

10.18 While Sturminster Newton has a smaller number of outlets than the other town centres, it does benefit from a medical centre, library and community centre. Sturminster is also a freestanding town with an important role in serving its rural catchment area. In our view Shaftesbury, Gillingham, Blandford and Sturminster Newton should continue to be designated as *Town Centres*. With the opening of the new Dyke and Sons supermarket, Stalbridge is now fulfilling the role of a *District Centre* and should continue to be designated as such.

10.19 Marnhull has only limited retailing which is spread around the settlement. In retail terms it does not fulfil the role of a *Local Centre* and we therefore recommend that it is not designated within the retail hierarchy. However, Marnhull and 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 North Dorset

Status	Centre
Town Centres	Shaftesbury Gillingham Blandford Sturminster Newton
District Centres	Stalbridge
Parades/Village Shops	All other small clusters of shops

Defining Centre Boundaries and Retail Frontages

10.20 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.

10.21 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.

10.22 The adopted North Dorset District-Wide Local Plan to 2011 (1^{st} Revision) (Jan 2003) states that the District has four main shopping centres at Blandford, Gillingham, Shaftesbury and Sturminster Newton. A diversity of mixed use development within these areas is encouraged by the Local Plan. Within the 4 main centres, properties have been surveyed to define "primary" and "secondary" shopping frontages (based on ground floor use) within the Local Plan. Some changes to these frontages have been recommended.

Shaftesbury Town Centre

10.23 The review of Shaftesbury's shopping centre boundary indicates two recommendations for change:

a) To remove the secondary shopping frontage which currently covers only a small, mainly residential section of Salisbury Street.

b) Define a PSA boundary in order to encompass the other town centre shops, restaurants, services etc. on Mustons Lane, Bell Street, Salisbury Street and Bleke Street which are outside the Primary frontages.

Gillingham Town Centre

10.24 Gillingham, similarly to Shaftesbury, is allocated with a primary and secondary shopping area within the Local Plan aiming to safeguard the retail core of the centre.

10.25 There is a natural break in the frontages within the town centre either side of Town Bridge and the delineation between Primary and Secondary frontages could be adjusted to reflect this. The Primary frontage could potentially be extended further east, incorporating the Lidl's food store on Newbury. There appears to be a movement of the primary shopping area from west to east.

Blandford Town Centre

10.26 Blandford is the largest and most spread out of the town centres in North Dorset where the requirements for Primary and Secondary frontages is most pertinent. It is considered that the existing designations continue to be appropriate and do not require amendment.

10.27 The commercial units on the southern side of Market Place and East Street have extensive backland plots. The Council should consider the possible inclusion of these within the PSA boundary in order to make principal of more intensive use of these areas for town centre uses. The Council will need to consider a number of issues such as flooding and impact on the historic built environment before determining whether this will be appropriate.

Sturminster Newton Town Centre

10.28 Given the compactness of the centre, it is considered that a distinction between primary and secondary shopping frontages is not required. It is therefore recommended that only a PSA boundary is included on the proposals map, although it is not considered appropriate to include to eastern side of Church Street.

10.29 Policy 3.16 “New Retail Outlets in Town Centres” states that:

> *“Within primary shopping frontage areas, development of additional retail uses (A1) will be permitted. Development of financial and professional services (A2) and food and drink uses (A3) will be permitted within secondary frontage areas subject to criteria in Policy 3.17.”*

10.30 In an attempt to allow flexibility of use but still preserve a wide range of uses, the Local Plan promotes that any change of use of A1 premises should not result in more than three adjacent units falling into another category of the Use Class Order. The Local Plan also promotes smaller shops or enlarging existing shops within the town centre (para. 37.4.4).

10.31 Policy 3.17 provides guidance as to when it is acceptable to change the use of a retail area:

> *“The retailing function of shopping centres will be protected by resisting the loss of A1 premises within the primary shopping frontage area.*
>
> *The change of use of retailing units within primary shopping frontage areas to financial/professional and food and drink uses will only be permitted where one or more of the following applies;*
>
> *(i) the vitality and viability of the area is not prejudiced;*
>
> *(ii) change of use does not result in an unacceptable concentration of similar uses. (e.g.) at least 1 adjoining unit should be in retail (A1) use;*
>
> *(iii) the existing shop frontage is retained.*
>
> *Applications for change of use to professional or food and drink uses in the secondary shopping frontage areas will be permitted. Change of use to other uses may be permitted where the property is on the periphery of the area with minimal pedestrian flows and providing that the existing shop front and fascia are retained where commercial redevelopment occurs.”*

10.32 The adopted North Dorset District Wide Local Plan to 2011 (1st Revision) (Jan 2003) resists the loss of A1 premises with the primary shopping area however changes of use to financial/professional and food and drink uses are permitted provided that the vitality and viability of the centre is not compromised. However, the change of use of properties within the secondary shopping areas appears far easier.

10.33 PPS6 suggests a predominance of Class A1 uses should be maintained within primary shopping frontages. However, within the more compact areas of Shaftesbury, Gillingham and Sturminster Newton there is less distinction between primary and secondary shopping frontages and the arbitrary application of frontage policies is perhaps unnecessary and could prove counter productive to the continued vitality of the centres.

Appendix A

Evaluation of Potential Development Sites

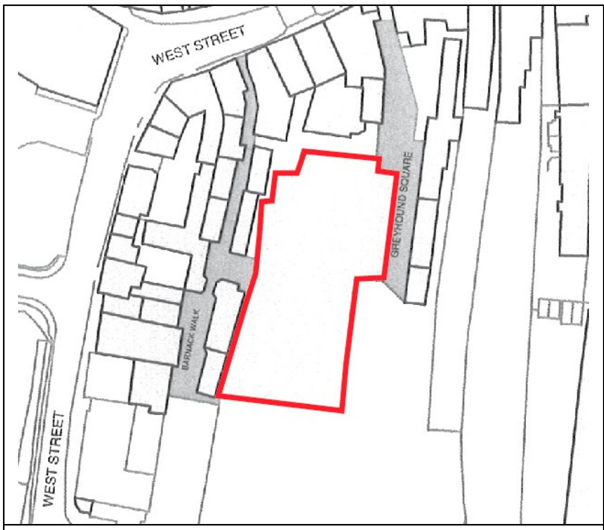
SITE SHAFT 1: Cattle Market

	This 0.7 ha edge of centre site is located to the east of the town centre, adjacent to the Tesco Car Park and is currently occupied by the cattle market.
Evaluation Criteria	*Comment*
Availability	The premises are still in active use although it is understood that there may be some willingness to vacate the premises
Scale of Development (retail/leisure/community/cultural)	The site could accommodate large scale development (up to 3,500 sq m) or provide additional car parking if Tesco wanted to extend their store onto part of their existing car park which is already heavily used.
Commercial Potential	Whilst located in an edge of centre location, the pull of Tesco and availability of car parking make this an attractive commercial development option.
Likely type of development	Large format retail warehouse or food store or potential for car parking
Development Constraints	Relocation of existing use
Possible Alternative uses	Leisure, community or housing
Access	Access is gained from Christies Lane. A link should be made through the Tesco car park in order to improve linkage with the town centre.
Overall Development Prospects	Good

SITE SHAFT 2: Postal Sorting Office

	This 0.23 ha site is currently occupied by the postal sorting office and also includes a telephone exchange. It is currently adjacent to but not part of the designated primary shopping frontage but could be included within a PSA boundary.
Evaluation Criteria	*Comment*
Availability	The site is currently in operational use. It was originally intended to be included within the Tesco redevelopment but did not become available
Scale of Development (retail/leisure/community/cultural)	The site could provide a small scale development resulting in a net increase of around 1,000 sq m gross of floorspace if the existing post office is retained
Commercial Potential	The site is well related to the existing retailing and would strengthen the link through to Tesco
Likely type of development	Parade of modern retail units of around 200 sq m each.
Development Constraints	Relocation of telephone exchange
Possible Alternative uses	Office or residential at upper floors
Access	Access is gained from Coppice Street and Angel Lane
Overall Development Prospects	Reasonable

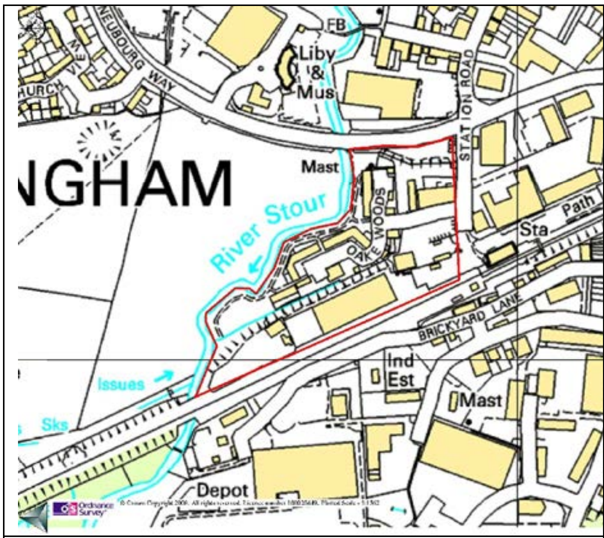
SITE BLAND 1: Vacant Morrisons Unit

	The former Safeway's (Morrisons) unit has been vacant for 3 years. It is a purpose built unit with car parking to the rear.
Evaluation Criteria	*Comment*
Availability	Short term
Scale of Development (retail/leisure/community/cultural)	Medium scale retail development. The unit has a gross floorspace of 1,900 sq m
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..Good pedestrian links on the route between the Marsh & Ham car park & the market place.
Likely type of development	Large format retail or food store.
Development Constraints	Morrisons have so far been reluctant to either reoccupy the unit or market it to a competitor or other retailer
Possible Alternative uses	Leisure
Access	Vehicular access is gained from West Street and pedestrian access from Market Place via Greyhound Square
Overall Development Prospects	Good

SITE BLAND 2: Stour House, 41 East Street

	This residential unit has an extensive rear garden and could potentially link through to Somerfield. The site extends to 0.5 ha.
Evaluation Criteria	*Comment*
Availability	Medium – Long term
Scale of Development (retail/leisure/community/cultural)	Medium scale (up to 2,500 sq m)
Commercial Potential	Small frontage on East Street on the edge of the Primary shopping Frontage
Likely type of development	Large format retail or food store.
Development Constraints	Existing residential use could affect availability in the short to medium term Listed building status Existing flood defences may need to be improved
Possible Alternative uses	Residential
Access	Access from Common Lane is narrow but currently serves the servicing of Mackays and a small car park
Overall Development Prospects	Reasonable/Poor

SITE GILL 1: Land at Station Road

	This 3.3 ha site is identified in the local plan as development site GH13. A development brief for the site has also been produced. The area is overgrown and derelict in part with some low quality warehouse buildings. The site is in an edge-of-centre location. This site, although identified for employment uses in the Local Plan, is assessed in the recent Employment Land Review (2007) as being more suitable for a mixed use development to compliment the Cattle Market scheme.
Evaluation Criteria	*Comment*
Availability	The land is under multiple ownership with a number of existing occupiers. Availability is unlikely in the short term.
Scale of Development (retail/leisure/community/cultural)	If the street frontage were to be developed for retail then 1,000 sq m gross retail could be accommodated. If the whole site were developed for retail around 6,000 sq m
Commercial Potential	The site benefits from good visibility and proximity to the adjacent Focus and Waitrose. Development of the site has not yet come forward despite planning permissions existing on the site in the recent past.
Likely type of development	The development brief identifies the potential for non-food retailing
Development Constraints	The development brief highlights a need to preserve or enhance the character of the 'Old Smoke House' located on the site.
Possible Alternative uses	The development brief includes mixed uses across the site including residential, office and community use
Access	Vehicular access can be gained from Station Road. Pedestrian links through to the town centre would involve crossing Le Neubourg Way.
Overall Development Prospects	Good. However, development should adhere to the guidance provided in the development brief and the redevelopment should be comprehensive.

Appendix B

Summary of Feedback from Stakeholder Workshops

Comments from the Retail Stakeholder Event 7 December 2007

Blandford

Redevelopment of the Morrisons site is key, the uncertainty is not good for the town. The redevelopment of the brewery site will bring more people walking into the town passing the store.

Town Council to tidy up the Thursday and Saturday markets – to bring them up to the same standard as the Farmer's market and the Continental Market held in September.

Traffic flow in the main street was considered to be an issue.

Sturminster
Car parking is the key issue in the town, many people are parking in the town and leaving cars all day in the car park and thus spaces are not available for shoppers visiting the town for an hour or so.

Saturday trading – some shops currently close on a Saturday afternoon and Sturquest are keen to encourage opening all day on a Saturday to develop trading opportunities.

Remove reference to cross – just Market

Strengths of Sturminster – Harts, Hansons, Olives et al.

Stalbridge
Car parking along the High Street is an issue and the need for a pedestrian crossing.
The opening of Dykes the new supermarket should help retain local people to shop in the area.

Shaftesbury

- Pedestrian connectivity from East of Shaftesbury extension will not exist.
- Linkage of enhancement from Angel Square to the Tesco is desirable. However, various road closures are being considered which could have a negative effect of diverted traffic through unsuitable roads.
- Potential for a Community Hall site on the cattle market conflicts with Tesco's expansion plans.
- Issue of traffic through Shaftesbury who are travelling to Gillingham to shop at the Waitrose.
- Aims for next 20 years: survival of current High Street in face of central location of Tesco, particularly with the EoS extension.
- Supermarket leakage not an issue. Except 'shoppers from the Don's who drive through Shaftesbury to get to Waitrose at Gillingham'.
- There is a need for more parking in the future.
- There is an increase of shoppers coming into Shaftesbury from Wimborne.
- Tourism is a big factor and very important for Shaftesbury, and occurs all year round.
- Shaftesbury and Gillingham Council's are communicating about locating future leisure facilities at Gillingham and community facilities at Shaftesbury so that the two towns don't compete for the same facilities.

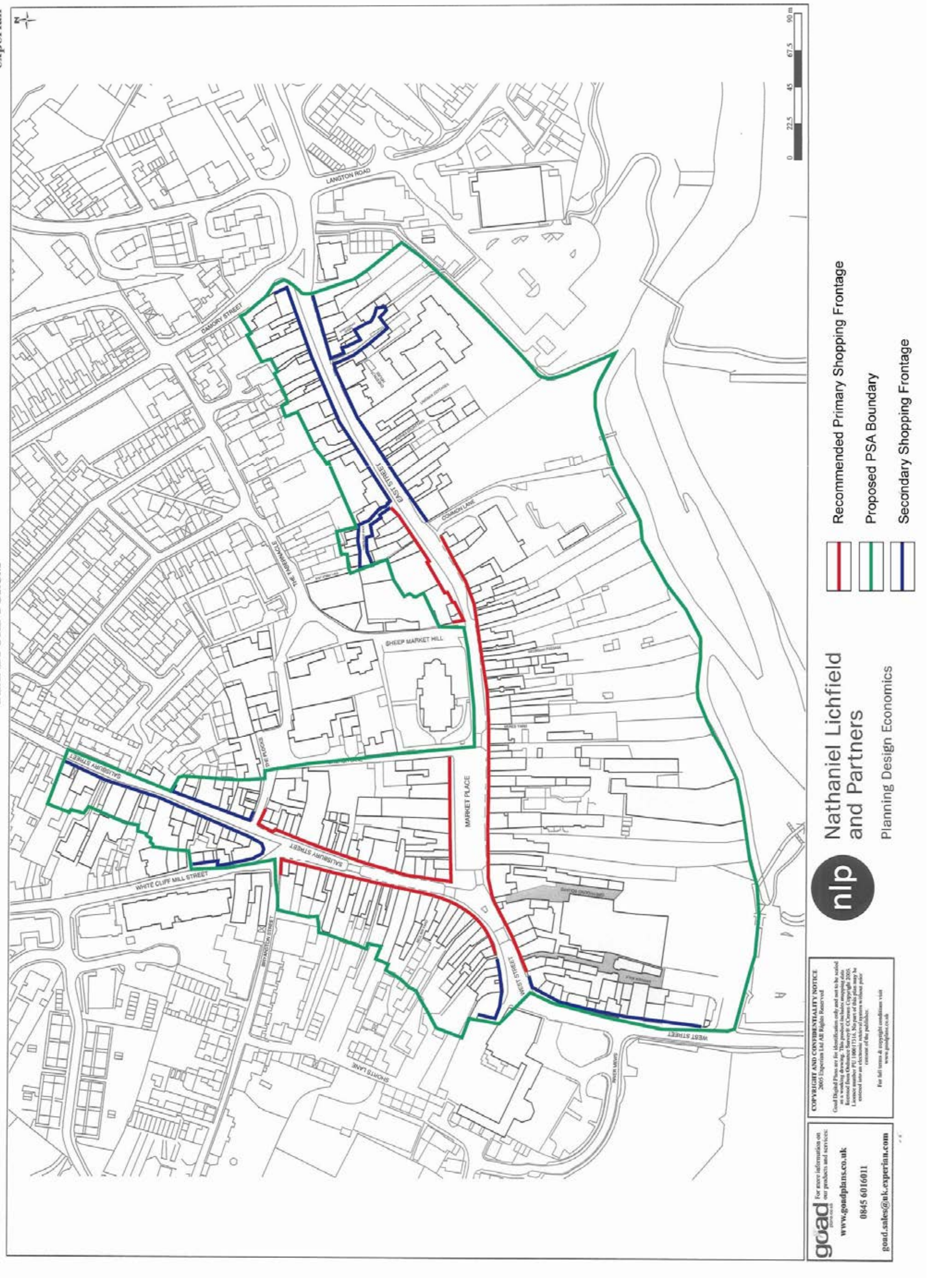
Gillingham

- Supermarket shopping leakage is minimal

- Waitrose has a large catchment area.
- People are shopping in supermarkets but not linking their visit to the Town Centre.
- Waitrose could act as an ‘anchor’ store, but currently the knock on effect of shoppers combining trips to the High Street is not happening.
- There is currently poor pedestrian linkage from Waitrose to town centre.
- Pedestrian desire line from Waitrose via Somerfield car park to the High Street should be exploited.
- Pedestrian linkages from Waitrose and the train station to the High Street are not well sign posted and perceived as unsafe and not pedestrian friendly.
- Small units on High Street are perceived as a negative for incoming traders.
- There are too many vacant units and charity shops on High Street.
- Deliveries and high street on street parking prevents flow of traffic.
- Le Neubourg Way diverts traffic around High Street and so people do not notice the High Street.
- Poor accessibility by public transport.
- Leakage of shoppers to Shaftesbury who seek better quality of shopping and better quality of shopping environment.
- Leakage of shoppers to Yeovil is mainly due to plentiful car parking and dual carriageway access.
- Leakage of shoppers to Salisbury is mainly via the rail link.
- Gillingham wants better quality High Street. The Parade currently has very poor design and is opposite an inadequate electricity sub station, but has excellent potential at its river side location at ‘Constable’ Town Bridge.
- There are lots of schoolchildren on the High Street at home time, but every shop has a notice in it saying ‘Only one school child at a time’
- Lidl reacts to the amount of floorspace available in any location. Its concept store is 1063sqm. Lidl are interested in expanding into Shaftesbury and Blandford.
- Shaftesbury and Gillingham Council’s are communicating about locating future leisure facilities at Gillingham and community facilities at Shaftesbury so that the two towns don’t compete for the same facilities.

Appendix C

Recommended PSA boundaries and retail frontages


BLANDFORD FORUM
experian
LANGTON ROAD
DAMORY STREET
EAST STREET
COMMON LANE
THE TABERNACLE
SHEEP MARKET HILL
THE PLOCKS
MARKET PLACE
SALISBURY STREET
WHITE CLIFF MILL STREET
BRYANSTON STREET
WEST STREET
SHORTS LANE
0 22.5 45 67.5 90 m
Recommended Primary Shopping Frontage
Proposed PSA Boundary
Secondary Shopping Frontage
nlp
Nathaniel Lichfield and Partners
Planning Design Economics
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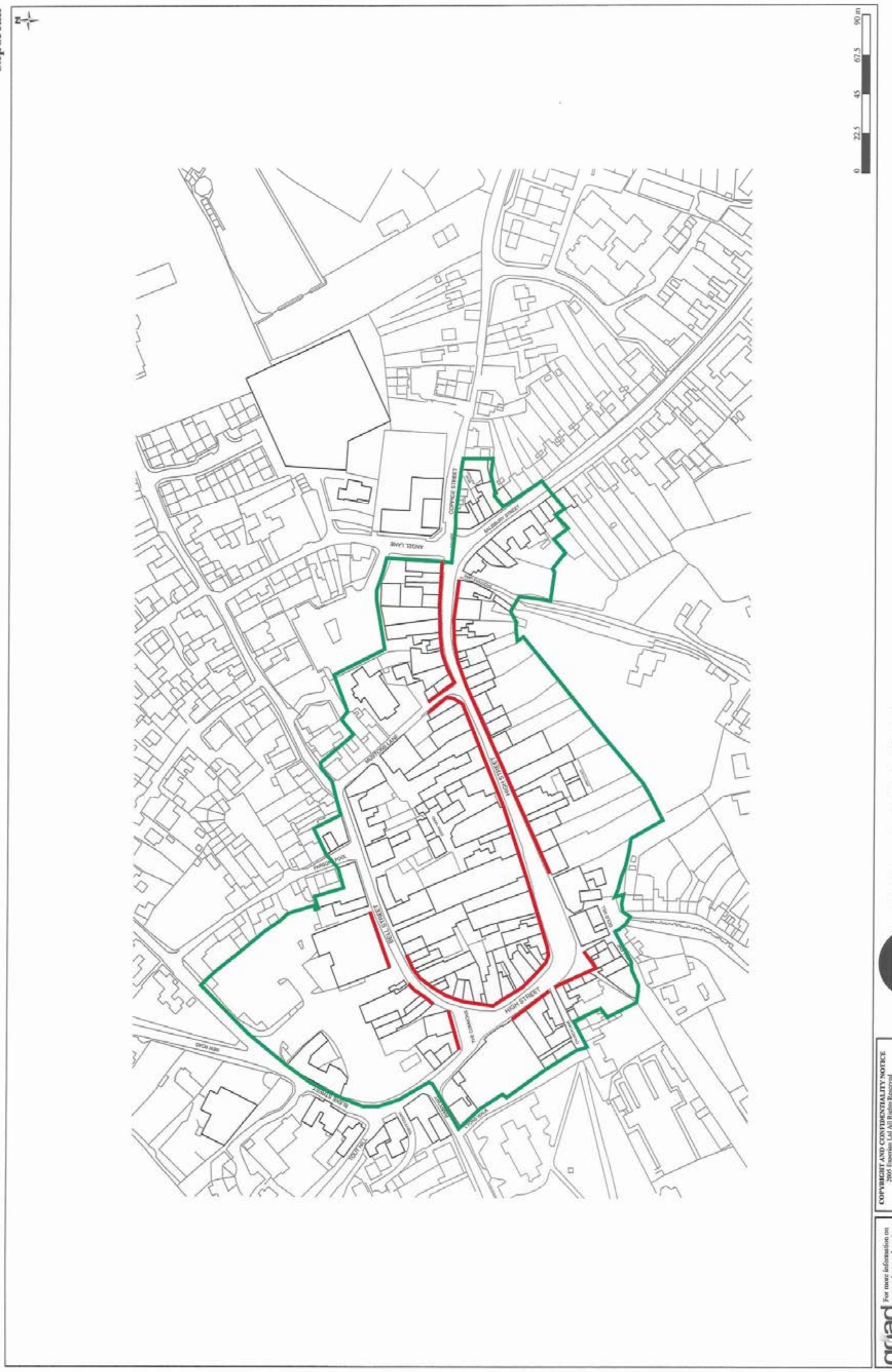
SHAFTESBURY
experian
Recommended Primary Shopping Frontage
Proposed PSA Boundary
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and Partners
Planning Design Economics
nlp
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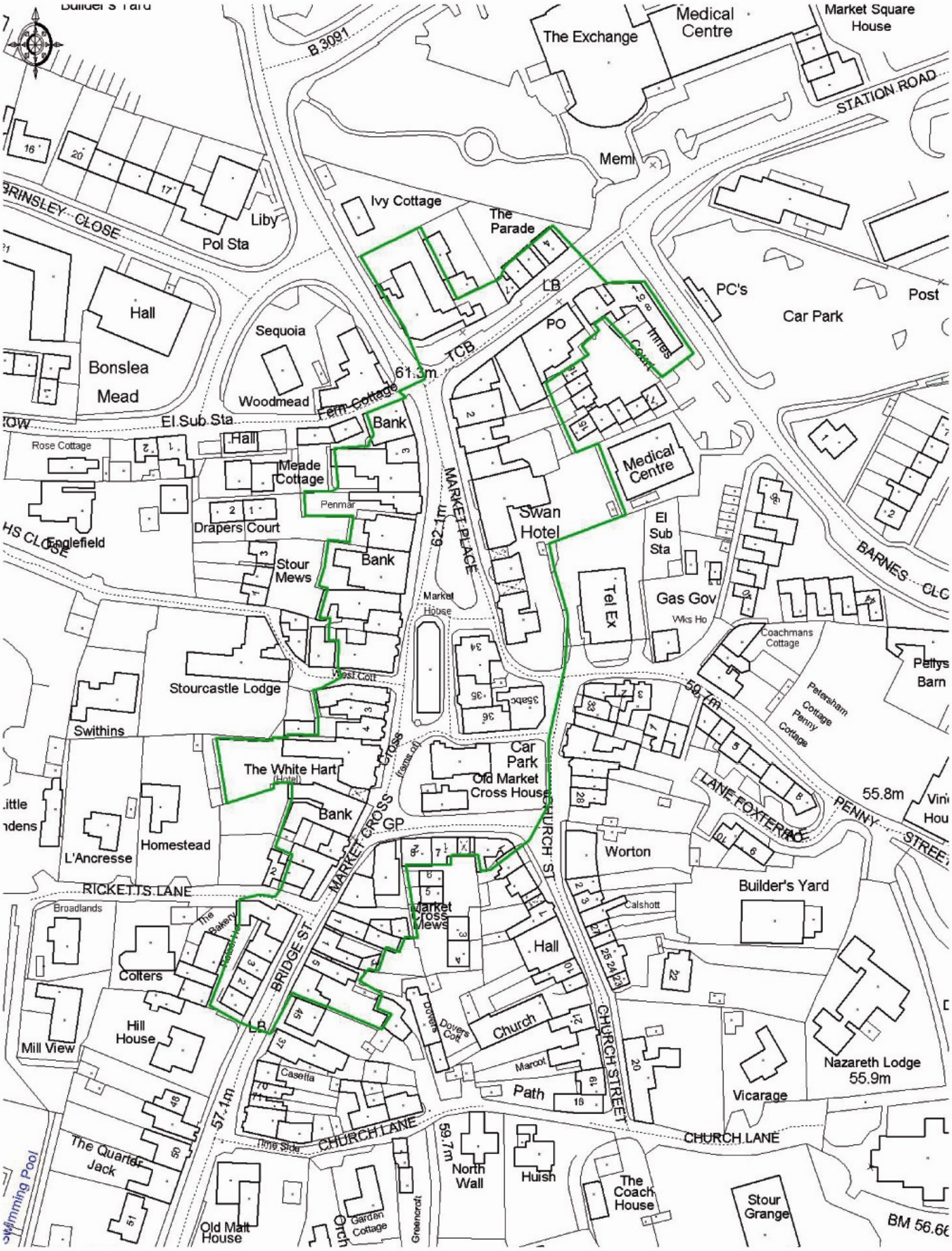


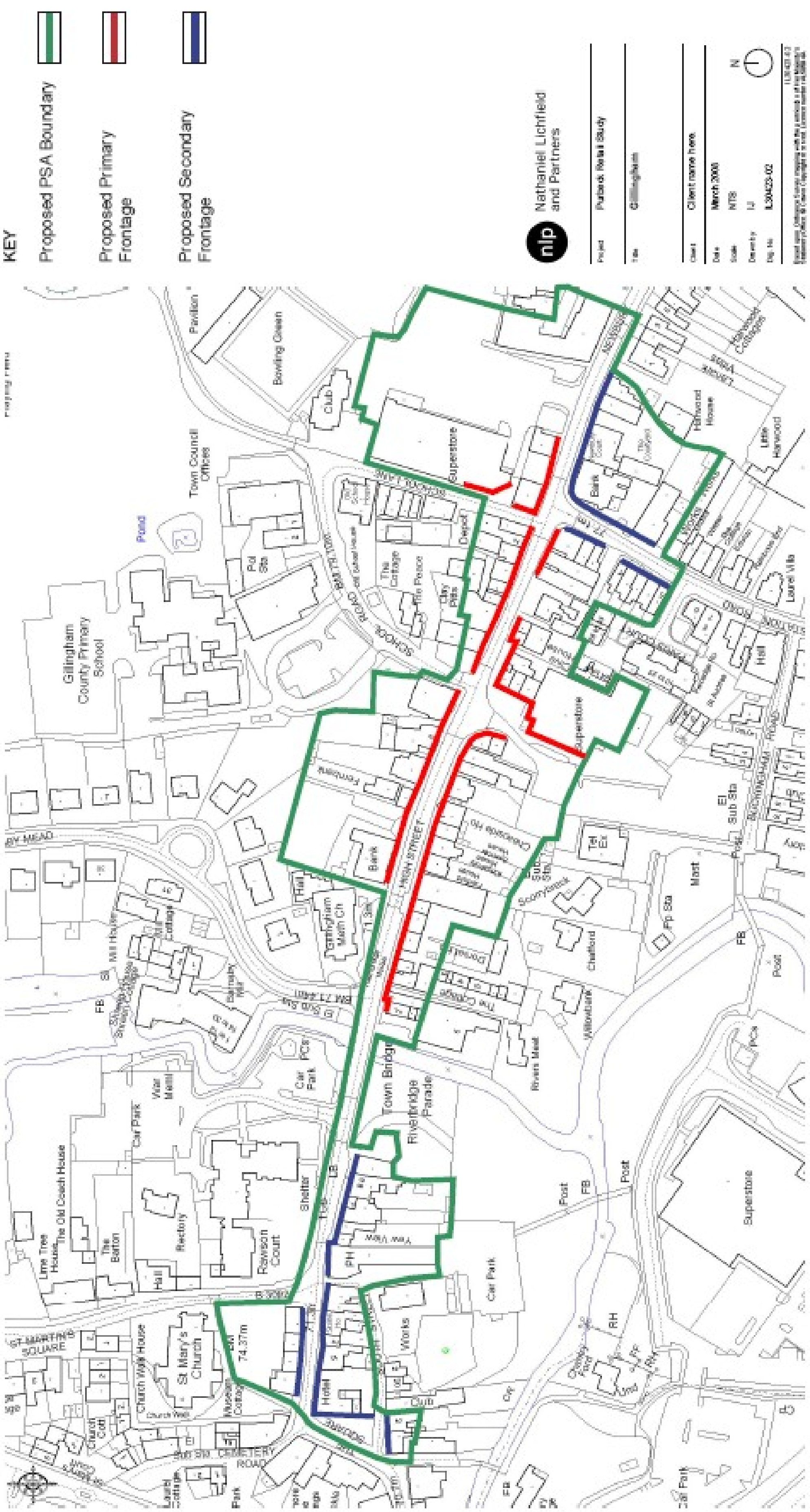
KEY

Proposed PSA boundary

Nathaniel Lichfield and Partners

Title	**Sturminster Newton - Recommended PSA Boundary**
Date	March 2008
Scale	NTS
Drawn by	IJ

N


KEY
Proposed PSA Boundary
Proposed Primary Frontage
Proposed Secondary Frontage
Nathaniel Lichfield and Partners
Client name here
HIGH STREET
Superstore
Gillingham County Primary School
Town Council Offices
Bowling Green
St Mary's Church
Riverbridge Parade
Town Bridge
Car Park