WEST DORSET DISTRICT COUNCIL WEYMOUTH AND PORTLAND BOROUGH COUNCIL

Joint Town Centre Retail and Leisure Study

Weymouth and Dorchester

FINAL REPORT

December 2008

CBRE
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INTRODUCTION

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INTRODUCTION

1.1 In August 2007 CB Richard Ellis (CBRE) were instructed by West Dorset District Council and Weymouth and Portland Borough Council to undertake an assessment of future retail and leisure capacity within Weymouth and Dorchester and the smaller towns within the West Dorset area. The findings of this study will assist in the preparation of the Councils' retail and town centre policies within the individual emerging Local Development Framework (LDF) and will form a robust evidence base covering retail and commercial leisure, together with other PPS6 town centre uses.

Aims and Objectives

1.2 The main purpose of this study is to inform the LDF. This aim is driven by the need for Weymouth and Portland, and West Dorset, (from here after referred to as 'the Councils') to prepare an up to date assessment and improve their understanding of the current and future need for retail and other PPS6 town centre uses in Weymouth and Dorchester over the plan period.

1.3 This document is the main report and focuses on Weymouth and Dorchester. A separate supplemental report is provided for the centres of Bridport, Sherborne, Lyme Regis and Beaminster in West Dorset and should be read in conjunction with this study.

1.4 The specific project requirements of the Councils' joint brief are summarised below:

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

Scope of Work

1.5 In order to fulfil the specific project requirements, CBRE has produced this study to address the retail and town centre use requirements for the town centre of Weymouth and Dorchester.

1.6 This study includes:

An Assessment of National Context

- A review of retail and town centre planning policy at the national, regional and local level; and
- A review of national retail trends.

An Assessment of Local Context and Settlement Functionality

- A quantitative and qualitative analysis of existing and proposed retail development within the settlements;
- A 'Health Check' of the town centres of Weymouth and Dorchester;
- An analysis of the competing and complementary roles of Weymouth and Dorchester and the potential of specialist roles for these centres; and
- A definition of the retail catchment areas of each of the towns, including presentation of the results of a household survey extending throughout the two Councils administrative areas and beyond as necessary.

An Assessment of Retail and Other Need (and Identifying Appropriate Scale):

- A qualitative and quantitative assessment of the need for new floorspace for retail, leisure and other town centre uses based upon a household shopper surveys;
- An analysis of the current market for retail and town centre uses in each of the towns; and
- Suggestions on the scale and nature of development required in each town.

The Consideration of Opportunities to Meet Need:

- A strategy for accommodating the identified need within Weymouth and Dorchester town centres;
- The identification of potential sites, providing an exploration of why they are required and an assessment of their availability and suitability;

Structure of Report

1.7 The structure of the remainder of this report is as follows:

- Section 2 provides an overview of relevant national, regional and local planning policy guidance;
- Section 3 identifies the recent and likely future national retail and leisure trends;
- Section 4 includes a health check of Weymouth and Dorchester town centres;
- Section 5 provides an explanation of the methodology employed in assessing

capacity and need;

- Section 6 identifies the study catchment area and the areas' key competitors
- Section 7 details the findings of the capacity assessment for Weymouth, Dorchester;
- Section 8 provides the findings of the assessment of need for 'other' town centre uses within the study area.
- Section 9 provides an sequential assessment of the sites identified; and
- Section 10 provides the studies conclusions and makes recommendations for the Council's future strategy.

2

PLANNING POLICY CONTEXT

PLANNING POLICY CONTEXT

2.1 In this section, we examine the key points of relevance from national planning policy guidance and the policies of the Development Plan.

National Policy Context

Planning Policy Statement 6: Planning for Town Centres (March 2005)

2.2 Planning Policy Statement 6 (PPS6) was published in March 2005. It replaces PPG 6 (June 1996) and subsequent policy statements, placing a fresh emphasis on pro-active planning for new development.

2.3 PPS6 sets out the Government's guidance on retail planning policy and planning for town centres. It advises the key objective for town centres is "*to promote their vitality and viability by planning for growth and development of existing centres; and promoting and enhancing existing centres by focusing development in such centres and encouraging a wide range of services in a good environment, accessible by all*" as well as "*Enhance consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially-excluded groups; Support efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and improve accessibility, ensuring that existing or new development is, or will be accessible and well served by a choice of means of transport*".

2.4 Town centre uses are defined as:

- "Retail (including warehouse clubs and factory outlet centres);
- Leisure, entertainment facilities, and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls);
- Offices, both commercial and those of public bodies; and
- Arts, culture and tourism (theatres, museums, galleries and concert halls, hotels and conference facilities)".

2.5 Furthermore, PPS6 confirms that it is not the role of the planning system to restrict competition, preserve existing commercial interests or to prevent innovation.

2.6 PPS6 requires regional planning bodies and local planning authorities to "*plan positively for growth and development*". In doing so, they are required to:

- "Develop and define a hierarchy and network of town centres;
- Assess the need for further main town centre uses and ensure there is the capacity to accommodate them;
- Focus development in, and plan for the expansion of, existing centres, as appropriate, and at the local level identify appropriate sites in Development Plan Documents;
- Promote town centre management, creating partnerships to develop, improve and maintain the town centre, and manage the evening and night-time economy; and
- Regularly monitor and review the impact and effectiveness of their policies for promoting vital and viable town centres."

2.7 The guidance re-emphasises the Government's "*town centres first*" approach in order to seek to strengthen and, where appropriate regenerate them.

2.8 Within a regional planning context, local planning authorities are required to actively plan for growth and manage change in town centres over the plan period by:

- "Selecting appropriate existing centres to accommodate the identified need for growth by:
  - Making better use of existing land and buildings, including, where appropriate, redevelopment; and
  - Where necessary, extending the centre.
- Managing the role and function of existing centres by, for example, promoting and developing a specialist or new role and encouraging specific types of uses in some centres; and
- Planning for new centres of an appropriate scale in areas of significant growth or where there are deficiencies in the existing network of centres."

2.9 In order to facilitate a positive planning approach, PPS6 seeks local authorities to:

"Assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations;

- Identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and or town centre, and identify centres in decline where change needs to be managed;
- Identify the centres within their area where development will be focused, as well as the need for any new centres of local importance, and develop strategies for developing and strengthening centres in their area;
- Define the extent of the primary shopping area and the town centre, for the

centres in their area on their Proposals Map;

- Identify and allocate sites as required;
- Review all existing allocations and reallocate sites, which do not comply with PPS6;
- Develop spatial policies and proposals to promote and secure investment in deprived areas by strengthening and or identifying opportunities for growth of existing centres; and
- Set out criteria based policies, in accordance with PPS6 for assessing and locating new development new development proposals".

2.10 In selecting sites for development, PPS6 provides a set of criteria and confirms that local planning authorities should:

- "Assess the need for development;
- Identify the appropriate scale of development;
- Apply the sequential approach to site selection;
- Assess the impact of development on existing centres; and
- Ensure that locations are accessible and well served by a choice of means of transport".

2.11 In assessing the need and capacity for additional retail and leisure development, local planning authorities are required to place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure developments. However, qualitative considerations should also be taken into account.

2.12 In planning for growth in their town centres, local planning authorities are required to allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their Development Plan Documents, although for large town centre schemes a longer period may be appropriate to allow for site assembly.

Emerging National Planning Policy

2.13 It should be noted that plans for the replacement of the Planning Policy Statement on Town Centres, PPS6 are in progress. A draft for consultation is due to be published and will have key implications on the future assessment of the location and strategy of retail and leisure developments.

2.14 As background to this draft the Competition Commission has recently investigated the Grocery Market and has made recommendations including the implementation of a *"Competition Planning Test"* (based on a Fascia Test) to supplement existing planning tests, with consultation of the Office of Fair Trading, on all stores and extensions of over 1,000 m^2. This will have implications when planning for additional convenience retail provision.

Development Plan Interpretation

2.15 Section 54A of the Town and Country Planning Act (1990) (as amended) and 38(6) of the Planning and Compulsory Purchase Act 2004 requires determinations made under the Planning Acts to be in accordance with the Development Plan unless material considerations indicate otherwise. The emergence of the new Act has defined the Development Plan as comprising the Regional Spatial Strategy for the region and the Development Plan Documents (taken as a whole) which have been adopted or approved in relation to that area.

2.16 The statutory development plan for this joint study comprises:

- RPG10: Regional Planning Guidance for the South West, adopted September 2001;
- The Bournemouth, Dorset and Poole Structure Plan, adopted July 2000;
- West Dorset District Local Plan, adopted July 2006; and
- Weymouth & Portland Local Plan, adopted December 2005.

2.17 In addition to the Development Plan other documents need to be taken into account, these will be material considerations in the determination of a planning application. These include:

- The Draft Regional Spatial Strategy (RSS) for the South West 2006-2026 (June 2006) including the proposed changes recommended by the Secretary of States Panel Report on the Examination in Public (February 2008); and
- The individual councils' emerging LDF.

Regional Planning Guidance

Regional Planning Guidance for the South West (September 2001)

2.18 Both of the Councils' administrative areas fall within the remit of RPG10: Regional Planning Guidance for the South West. This guidance provides a regional framework for the preparation of Local Authority Development Plans, and is a primary consideration in the decision making process. In the case of RPG10 It is noted that the replacement Draft Regional Spatial Strategy is at a relatively late stage of production and is due out by the end of the year. Weight therefore should be placed on both documents with greater weight allocated to the sections comprising adopted policy.

2.19 RPG10 identifies both Dorchester and Weymouth as Strategically Significant Cities and Towns (SSCTs). These towns are recognised as places which offer the greatest opportunities for employment, and the greatest levels of accessibility by means other than car to cultural, transport, health, education and other services.

2.20 Policy EC2 recognises the structural decline of the Weymouth/Portland area and allocated it for special need. As such, priority should be given in the policies, programmes and funding of local authority, investment agencies and partnership bodies to measures for economic restructuring and regeneration.

2.21 Policy EC6 sets out requirements relating to town centres and retailing, whereby local authorities should seek to locate developments which attract large numbers of people, including retailing and leisure, in the centres of the PUAs and in the "other designated centres for growth specified in the spatial strategy."

2.22 The guidance also indicates that in preparing development plans, local authorities should:

- Encourage town centre development of an appropriate scale in the market towns and larger settlements;
- Ensure the vitality and viability of existing centres by assessing the need for new development and by applying the sequential approach in PPS6 to site selection;
- Make no further provision for proposals to build or extend major regional or sub-regional out-of-town shopping centres; and
- Ensure development is located where it can help reduce the need to travel.

Structure Plan Policy

The Bournemouth, Dorset and Poole Structure Plan (July 2000)

2.23 The Bournemouth, Dorset and Poole Structure Plan (formerly known as the Dorset County Structure Plan) was adopted in July 2000 and covers the period up to 2011.

2.24 Paragraph 3.12 of the supporting text explains the economic difficulties in the Weymouth & Portland and Dorchester Area. The aim therefore, within the period of this plan is to assist the area in regaining the economic prosperity it previously enjoyed before suffering significantly from defence-related closures and relocations. Difficulties in the area led the Government to grant Weymouth and Portland (together with Chickerell) Intermediate Assisted Area Status.

2.25 Within chapter 7 the County's retail policies are set out. Shopping Policy A establishes the sequential approach where development should in the first instance be located in or adjacent to the existing shopping centres of the Bournemouth-Poole conurbation, and the main towns which include Weymouth and Dorchester.

2.26 Shopping Policy A continues by providing guidance whereby all development and or redevelopment should:

- Be compatible in character with the centre;
- Maintain and or enhance the vitality and viability of the centre;
- Not adversely affect to a significant degree the vitality and viability of any nearby town, district or local centre as a whole;
- Not prejudice the availability of employment land; and
- Be easily accessible by a choice of means of transport.

2.27 Shopping Policy B further explains that 'provision should be made for the retention and improvement of local shopping facilities.'

Local Plan Policy

West Dorset District Local Plan (July 2006)

2.28 The West Dorset Local Plan was adopted in 2006. The district covers a large rural area encompassing Dorchester, Bridport, Lyme Regis, Sherborne, Beaminster, and Chickerell as well as surrounding rural parishes.

2.29 Policy SS1: Development within the Towns and Rural Areas identifies Dorchester as a town where development will be permitted.

2.30 Chapter 13 of the West Dorset District Local Plan sets out policies specifically for the Eastern Area which covers Dorchester and its surrounding area. This section identifies some specific sites for land allocations. Important allocations include:

- Community facilities, including a shop within development at Charlton Down (Policy EA5);
- A mixed use scheme, including local retail provision in Putton Lane (Policy EA6);
- Retail development in Charles Street consistent with the quantitative and qualitative need for new shopping in the catchment area, where this cannot be accommodated within the primary shopping area and would be appropriate scale (Policy EA14);
- Leisure and minor ancillary retail facilities in the Weymouth Avenue area (Policy EA15);
- Mixed use development, including retail on the frontage of Trinity Street (Policy EA16); and
- Mixed use development, including community facilities and leisure and recreation uses in the Poundbury North Area (Policy EA17);

2.31 The Council's town centre and retail policies are set out in Chapter 8, under the heading 'Community Issues'. Policy C0 sets out guidance for Town Centres, explaining that;

- Development proposals for retail, leisure, offices and the arts should be directed to the town centres;
- Where the primary shopping area is identified separately from the wider town centre area, as in the case for Dorchester, retail development should be directed specifically to the primary shopping area within the town centre;
- All development proposals should be appropriate in type and scale to the particular town centre and the catchment population which is served; and
- A high standard of design will be required in order to ensure that the centres retain and extend their vitality and viability.

2.32 Retail development guidance is covered in Policy C1, which states;

- "Development including change of use for retailing will be permitted within the primary shopping area of Dorchester and the town centres of the other towns as defined on the Proposals Map;
- Within these areas, development proposals for financial and professional services or for food and drink (Classes A2-A5 in the Town and Country Planning Use Classes) will not be permitted if the proposal would either individually or cumulatively dominate the frontage so that it would undermine the vitality and viability of the shopping area;
- Development which by virtue of its size or design would adversely affect the liveliness, attractiveness or character of the primary shopping area or town centre will not be permitted;
- The use of upper floors for commercial uses or residential accommodation will be permitted."

2.33 The West Dorset district is expected to accommodate significant growth in population over the coming years. Chapter 6 of the Local Plan provides details on the planned housing growth to the area. Table 6.1 of the Local Plan details the housing land supply and indicates that between 2005-2016 a further 4,722 dwellings are proposed, including 3,087 between 2005-2011 and 1,635 between 2011-2016.

2.34 To meet this requirement the Local Plan provides a list of housing allocations. These sites are located throughout the Plan area and offer the potential to supply a total of 2,530 units by 2016. The sites identified to meet this growth are given in Table 6.2 of the local plan. The list includes several sites close to Dorchester town centre (Charles Street, Trinity Street and Weymouth Avenue) as well as a site at St George's Road on the eastern side of the town, and sites in the major urban extension of Poundbury to the west.

2.35 These figures accord with Structure Plan and Regional Spatial Strategy housing requirements that were given at the time of the adoption (2006). It is noted that these figures will now have been updated. Details of the most recent planned housing figures are given in the section on the draft RSS panel's report within the section on emerging planning policy.

Weymouth & Portland Local Plan (December 2005)

2.36 The Weymouth and Portland Local Plan was adopted in 2005 and sets out detailed policies for the development and use of land up to 2011. It covers the administrative area of Weymouth and Portland Borough Council, comprising Weymouth and the Island of Portland and several smaller district centres.

2.37 The Weymouth Urban Area is defined by a Development Boundary, within which 'residential, employment and other development to meet the needs of the local area may be permitted' (Policy D1).

2.38 Policy D3 sets out General Development Criteria to which proposals for development will be determined by. The criteria are as follows:

- Buildings and spaces should respect those features that contribute to "local distinctiveness" and the character of the area;
- Designs and layouts should be safe, take account of crime prevention and community safety issues and, where possible, be accessible by persons with a disability;
- Proposals should not be detrimental to the environment by virtue of noise, smoke, fumes, dust or other emissions;
- Existing landscape, townscape, river, coastal, nature conservation, and other environmental features, including linear and stepping stone features that penetrate built up areas or link consolidated open areas, and the best and most versatile agricultural land should be respected for their intrinsic value and retained, protected or enhanced where possible;
- Proposals should help to "green" the residential environment by assisting sustainable drainage, contributing to biodiversity, promoting energy efficiency in layout and design and creating more opportunities for retaining and planting trees in the borough;
- Proposals should not have a seriously detrimental impact on the privacy and amenity of existing occupiers and new occupiers;
- Design and layouts should focus on the quality of places and living environments, and give priority to pedestrians rather than the moving and parking of vehicles;
- Access, parking, open space where appropriate, and other services should be provided in accordance with the policies in this plan; and

- New development should not pose a risk to highway safety.

2.39 The Council's retail policies are set out in Chapter 7, where paragraph 7.1.1 of the supporting text identifies Weymouth town centre as the shopping and leisure focus for both residents and visitors.

2.40 Policy S1: Proposals for New Retail or Leisure Development explains, in accordance with the sequential approach, that proposals for new retail or leisure developments should, in the first instance be located within the Town Centre and Harbour side Commercial Area. If no appropriate sites are available in the Town Centre and Harbour side Commercial Area, and a need has been demonstrated, development is to be located on the edge of that area; and if no appropriate sites are available there, and a need has been demonstrated, development is located so as to be easily accessible by walking, cycling and public transport

2.41 Paragraph 7.2.6 identifies the Borough's local centres as:

- Easton Square;
- Portland Road, Wyke Regis;
- Littlemoor Centre;
- Fortuneswell;
- Abbotsbury Road, Westham;
- Lodmoor Hill; and
- Southill Centre.

2.42 Policy S2 sets out design objectives for shop fronts and access to upper floors; prohibiting any retail development that does not provide a well designed shop front along defined shopping frontages subject to the consideration of historical conservation. Where possible, retail development should also maintain or create a separate access to upper storeys to enable their separate use as residential, office or other commercial space.

2.43 In reference to leisure activities, Policy S3 includes that proposals for restaurants, pubs and clubs will only be permitted where the development does no damage the amenity of nearby residents through odour, noise, disturbance and operating hours, and shopping frontages are protected.

2.44 Development for ground floor premises in the primary shopping frontage, covered by Policy S4, must meet the following criteria:

- "The proposal is for a shop (class A1 retail) use only; or
- The proposal is for financial or professional services (class A2) or for the sale of food or drink (class A3 retail), and the cumulative effect of A2 and A3 uses does not significantly reduce the dominance of shops (A1 uses) in the Primary Shopping Frontage..".

2.45 Following this, proposals for ground floor premises within secondary shopping frontage will only be permitted where:

- "The proposal is for a shop (class A1 retail) use only;
- If the proposal is not for a shop (class A1 retail), the cumulative effect of financial or professional services (class A2) and premises for the sale of food or drink (class A3) do not become dominant."

2.46 Finally, Policy S6 states that development within the local shopping frontages of local centres will be permitted if the proposal is for retail or community use only, and if the proposal is not for a shop (class A1 retail) and the range of convenience shopping facilities available locally is not compromised.

2.47 In terms of housing growth, the Bournemouth and Poole Structure Plan identified a target for 4,700 dwelling completions in Weymouth and Portland between 1994 and 2011. By March 2007 a total of 3,481 dwellings have been completed. Of the remaining local plan allocation up to 2011 it is estimated that 232 of the 290 will be completed during this period. The largest sites being developed is the Hardy Accommodation Complex in Castletown, which will provide 215 units between (2006-2011).

2.48 The Borough also plans to achieve an average windfall total of 120 dwellings per annum (480 to 2011). There are two significant windfall sites, the Ferry Terminal (300-350 flats) and the QinetiQ site (100 flats) all expected to be developed by 2011. In total this represents an over supply of 360 dwellings against the Structure Plan target of 4,700 dwellings.

2.49 It is acknowledged that revised housing figures are being proposed within the forthcoming RSS which will identify new housing requirements for the area.

Emerging Policy

The Draft Regional Spatial Strategy for the South West (June 2006)

2.50 The Regional Spatial Strategy (RSS) is due to be adopted at the end of the year at the earliest. Once adopted, this will form the first Regional Spatial Strategy for the South West Region for the period 2006-2026.

2.51 Similar to RPG10 the draft RSS promotes Weymouth and Dorchester as important centres, identifying them as Strategically Significant Towns in Development Policy A: Development at the Strategically Significant Cities and Towns (SSCTs). The towns and cities identified within this policy will be the primary focus for development in the South West. Provision will be made to maintain and enhance the strategic function of these SSCTs through development of a wide range of commercial and public services, community and cultural facilities and no-car links to the communities they serve.

2.52 Weymouth and Dorchester are located within the south east of the region. Policy SR25 sets out guidance for development in the south east, where emphasis is to manage development by enabling SSCTs to develop and improve their roles as service and employment centres, enhancing regional prosperity, in a way that recognises the strong environmental constraints of the sub-region and the implications this has on the pattern of development.

2.53 Weymouth is also identified in Policy T01: Sustainable Tourism and TO3: Major New High Quality, High Profile Attractions whereby Local Authorities should promote the development of tourism by maintaining and enhancing the role of major resorts such as Weymouth (Policy T01), and locate major new tourism attractions particularly within such major resorts.

2.54 Policy SR31 encourages Dorset County Council, West Dorset District Council and Weymouth and Portland Borough Council to plan for a balanced growth of Dorchester and Weymouth, it seeks for:

- Maximising the use of previously developed land and buildings.
- Cooperation, particularly at cross-boundary locations, through joint work on LDDs, and addressing the contributions arising from Section 106 agreements and other funding mechanisms to deliver key infrastructure.
- Provision for job growth in the Dorchester and Weymouth TTWA (travel to work area) of between 7,300 to 9,500 jobs and an average housing provision of about 200 dwellings per annum at Dorchester and about 250 dwellings per annum at Weymouth over the plan period.
- Policies in the LDD that will stimulate economic opportunities, reduce in-commuting and reflect the high-value environmental assets surrounding Dorchester.

2.55 The importance of working together for local authorities and stakeholders is explained in Development Policy J, where Dorchester and Weymouth are identified for joint working, enabling interactions and the balance of development between the two areas.

2.56 Policy TC1 sets out the guidance for cities and town centres in the South West, where the SSCTs, identified in Development Policy A *'will be the main focus for new investment in retail and other major facilities requiring high levels of accessibility to the communities they serve, recognising their function as focal points for extensive catchment area populations.'* This policy further explains that *'the scale of new investment in retail and other facilities within town centres should take full account of changing patterns of behaviour and future levels of population growth.'*

2.57 In terms of housing growth the draft RSS identified Weymouth and Portland HMA (which includes West Dorset) for the following provision over the plan period.

	Overall annual net dwelling requirement 2006/2026
West Dorset	1. 410
Weymouth and Portland	2. 280
Total	3. 690

Source: Draft Regional Spatial Strategy for the South West (June 2006)

2.58 As part of the annual net dwelling requirements, the strategically significant towns of Weymouth and Dorchester are required to provide 250 and 200 dwellings in the towns respectively. Details of where these houses are planned will consider existing commitments and urban capacity and any additional allocations required would be planned through the LDF process.

RSS Proposed Changes (July 2008)

2.59 In 2007 the Secretary of State held an Examination in Public (EiP), which took place over 10 weeks from April to July 2007 chaired by an independent Panel. In January 2008 the independent Panel published the report of the Examination. This took account of the various debates from the EiP and made recommendations to the Secretary of State for changes to the Draft RSS.

2.60 Following publication of the independent Panel's report on the draft RSS, the Secretary of State issued Proposed Changes to the draft RSS in July 2008 for a twelve-week period of public consultation. Responses to the consultation are currently being considered and it is anticipated that the RSS will be adopted in 2009.

2.61 The principal changes relevant to this study are those relating to the proposed housing growth for the area. The revised Policy HMA 12 for the Weymouth and Dorchester Housing Market Area proposes housing growth of at least 18,100 dwellings over the twenty year period in the HMA, allocated as follows:

West Dorset District

- 4,000 in Dorchester Urban Area (including the already planned urban extension at Poundbury) (200 per annum);
- 3,000 in Dorchester Urban Extension (150 per annum);
- 700 at Weymouth Urban Extension (35 per annum);
- 4,800 within the remainder of the District (240 per annum);

Weymouth and Portland

- 5,000 in Weymouth Urban Area, (250 per annum); and
- 600 in the remainder of the borough (30 per annum).

2.62 This increases the housing allocation to the area in order to accommodate the predicted growth identified by the Government (DCLG) as well as to help address the deficit of affordable housing in the HMA.

2.63 To accommodate this growth, the proposed changes recommend the release of land will be phased and controlled so that preference is given to previously developed land first before green field land. A development rate of 280 per annum for Weymouth is proposed, including 250 per annum within Weymouth & Portland Borough and 30 per annum in an extension in West Dorset. For Dorchester, a development rate of 350 per annum is proposed: 200 per annum in the existing urban area including the already-planned urban extension at Poundbury, plus 150 per annum in a new urban extension.

2.64 West Dorset is shown to provide the bulk of the growth including the Weymouth Urban extension which will involve the development of a further 700 dwellings across into West Dorset. This is as a result of a lack of suitable sites available within the Weymouth administrative boundary, capable of accommodating this level of residential development.

Local Development Framework

2.65 Under the Planning and Compulsory Act (2004), Councils must prepare a series of planning policy documents. These will make up the LDF, replacing previous Local Plans.

Weymouth and Portland Borough Council

2.66 In Weymouth and Portland, work on the Core Strategy has reached the Issues and Options phase. The Core Strategy aims to establish a clear strategic vision, objectives and policy in accordance with sustainable development principles and helps to determine the broad location of new housing and employment that are necessary to meet the needs of Weymouth and Portland up to 2026.

2.67 In addition to this Joint Town Centre and Retail Study, the Council has also commissioned a range of specialist work to help inform the Core Strategy and other Local Development Framework documents. A list of current research projects is listed below:

- Strategic Flood Risk Assessment;
- Housing Market Assessment;
- Open Space, Sport and Recreational Facilities – Audit and Assessment;

- Developing and Economic Vision for Weymouth and Dorchester;
- The Future of South Dorset;
- Your Place, Our Future.

2.68 These issues papers and other background research material cover topics such as:

- Spatial Context;
- Health;
- Sport and Recreation;
- Education;
- Environment;
- Landscape;
- Crime;
- Retail;
- Arts Culture, and Communities;
- Economy, Employment, and Tourism; and
- Transport.

2.69 In terms of the Retail Issues paper, this identifies a set of questions to identify what residents would like to see more of in Weymouth Town Centre and what they dislike.

2.70 Work on the Weymouth Town Centre Area Action Plan (AAP) has also reached the Issues and Options stage. The AAP will provide a strategic, focused and co-ordinated approach to facilitate the regeneration of Weymouth Town Centre. The aim of the Plan will be to maximise the potential for tourism, retail and related businesses whilst improving the quality of the townscape. The AAP will help deliver improvements and new development in the town centre to capitalise on the opportunities offered by the 2012 Olympic Games.

West Dorset District Council

2.71 West Dorset District Council has also started work on the Core Strategy. Following the original issues and options stage in 2007, further consultation on options for the additional development proposed in the RSS Proposed Changes will take place in 2009 before the Core Strategies 'Preferred Options' stage.

2.72 There are a number of existing reports which were produced in order to inform the previous Local Plan and which are relevant to this study. In particular these include Town Centre Health Checks of Dorchester (2000), Bridport (2000), Lyme Regis (2004) and Sherborne (2004).

2.73 This retail study forms one of a number of different research projects West Dorset District Council is currently working on. Including an:

- Strategic Housing Land Availability Assessment
- Employment Land Review;
- Rural Functionality Study;
- Audit and Assessment of Open Space, Sports and Recreational Facilities;
- Strategic Flood Risk Assessment;
- Dorset AONB Landscape Character Assessment;
- Housing Need and Demand Survey;
- Economic Vision; and
- Sustainability Appraisal.

2.74 The findings of this retail study will provide evidence to inform the development of the LDFs of both local authorities.

2.75 In terms of housing growth, looking ahead the draft RSS sets a target specifically for the Strategically Significant Towns (SSCT) of Weymouth & Dorchester. The LDF process for both Councils is at too early a stage to confirm the proposed locations for this growth. It is however anticipated that much of this growth can be met through windfall sites, and on brownfield land within the area. Nevertheless it is acknowledged that greenfield land will need to accommodate the additional development set out in the adopted RSS.. Appropriate sites could prove difficult to find, due to the natural and environmental constraints such as the Jurassic Coast World Heritage Site and the AONB designation.

3

REVIEW OF RETAIL AND LEISURE TRENDS

REVIEW OF RETAIL AND LEISURE TRENDS

3.1 This section provides an overview of recent and likely future national retail and leisure trends, as informed by CBRE Research and following discussions with our Agency Representatives.

National Retail Trends

Market Commentary

3.2 In November 2007 all property sectors witnessed a sharp decline in capital growth, with a fall to -14.8%, the lowest on record. Unlike previous trends, total returns within the retail sector were lower than that of industrial and office sectors, with a reported total return in the YTD of 0.3% this is on account of a 1.9% decline in October. (Source: CB Richard Ellis UK Monthly Index, November 2007).

3.3 Official statistics show that retail sale volumes fell by 0.1% between September and October 2007 compared with a revised increase of 0.3% on the previous month. Accordingly, monthly declines have been recorded in sales across all retail sectors, with the exception of non-store retailing and repair. However, quarterly and annual figures, which are less volatile, show that underlying growth remains solid. Growth in sales volume rose 1.4% in the three months to October, 4.4% on an annual basis. This rise was predominantly for non-food stores, although the three-monthly sales volume for food stores increased by 1.2%, the highest growth for this sector since August 2006, Clothing and footwear stores had a sales growth of 2.3%, with non-store retailing and repair increasing by 2.8%. (Source: CB Richard Ellis Retail Sales Monitor, November 2007 and ONS).

3.4 In summary, while the recent trend highlights a monthly decline in retail, the market remains reasonably robust, and total sale volumes over the three months to October was 5.1% higher than in the same period a year ago. (Source: ONS).

3.5 Retail rental growth remained muted in the first 6 months of 2007, due to weaker occupier demand in light of uncertain future consumer spending habits. Of the retail sub-sectors, retail warehouses has seen the sharpest fall in rental growth, recording 2.2% in the year to June. This is almost half that recorded a year earlier, and is expected to be due to weaker occupier demand in the bulky goods sector. Higher operating costs, persistent price competition and the general consumer outlook all contribute to modern retail rental growth prospects. (Source: CB Richard Ellis UK Retail Briefing, Issue 1 2007).

3.6 Consumer confidence has also slowed, with projections of reduced consumer spending growth due to higher borrowing costs, rental growth and investor demand in all areas of the retail sector. Consumer confidence is anticipated to continue in negative territory following the credit card crisis and fall in equity markets, feeding through to consumer spending.

3.7 Investment demand for retail has also fallen back sharply. The shift in investor sentiment has raised the downside risks to the yield outlook. Prime yields across retail warehouses climbed 40 basis points in Quarter 3, with weaker investment demand particularly for bulky goods sector Fashion and Open A1 retail park yields rose 40 basis points to 4.4% and 4.6%, respectively in Quarter 3. Bulky Goods retail park yields softened 50 basis points to 5.4% over the same period. (CB Richard Ellis UK Prime Rent & Yield Monitor, Quarter 3 2007).

3.8 This year has also seen increasing retailer interest in 'ethical' or 'green' business practices. Grocery chains in particular have been quick to jump on the green bandwagon: introducing re-usable bags, and compostable packaging for example. Environmental issues are also becoming increasingly important for retailers as another factor in influencing where consumers shop, as well as raising their profile. It is also important for investors, who need reassurance that retailers are minimising their risk to potential ethical embarrassments, which may ultimately prove damaging for sales.

Retail-led Development Pipeline

3.9 The impact of the Government's retail planning policy, seeking to direct investment to town centre locations, is clearly evident in the Development Pipeline, with town centre pipeline levels growing almost continuously since the mid-1990s.

3.10 Floorspace levels in the Shopping Centre Development Pipeline are at the highest level recorded since the early 1990s. In the first quarter of 2003 there was 4.64 million m^2 of shopping centres floorspace in the pipeline, of which 75% was accountable to town centre schemes by the end of that year. In comparison, the first quarter of 2007 has shown an increase in floorspace in the pipeline to 5.87 million sqm, up from 5.56 million sqm in the third quarter of 2006. Pipeline increases are being seen at all stages of the planning process. Just three regions: Greater London, the North West and South East account for almost half of the total shopping centre pipeline. (Source: CB Richard Ellis UK Retail Briefing, Issue 1 2007).

3.11 The majority of floorspace is scheduled to be completed over the 2008-10 period. Peak completion levels are due in 2008. A number of particularly large shopping centre schemes are scheduled to be completed in the East Midlands, Greater London, North West, Scotland and South West and South East regions at this time.

3.12 Despite the number of new schemes in the pipeline increasing to 40% of the total in the first half of 2007, most schemes in the pipeline are extensions, redevelopments or replacement stock. Mixed use schemes are becoming increasingly popular, largely because of the dearth of quality shopping centre sites: most of the best town centre sites were developed many years ago. (Source: CB Richard Ellis UK Retail Briefing, Issue 1 2007).

3.13 Retail warehouse park pipeline floorspace levels declined further over the last six months, as harsh planning restrictions continue to constrain development. Floorspace levels fell in the first quarter of this year to just 2.20 million sqm (23.68 million sq ft), down from 2.28 million m^2 in the third quarter of last year. Completion levels also fell over the same period to under 0.20 million m^2, and are now at levels not seen since the early 1990s recession. (Source: CB Richard Ellis UK Retail Briefing, Issue 1 2007).

3.14 However, the demand for good retail warehouse schemes remains strong, and it is planning obstacles rather than demand side weaknesses, that have kept the lid on development activity. Rising building costs, harsh planning and regulatory constraints are encouraging developers to focus on redevelopment or extensions, rather than building entirely new schemes. The number of extensions in the pipeline increased over the first six months of 2007 to just under 25%, as have redevelopments and refurbishments. Despite this, the majority (60%) of retail warehouse schemes in the pipeline are entirely new. (Source: UK Retail Briefing, Issue 1, July 2007).

3.15 With no imminent relaxation of planning regulations, completion levels are expected to remain around the 200,000 m^2 per annum level over the next few years.

Floorspace Requirements

3.16 Despite sluggish letting markets, there is still strong demand from retailers for larger modern quality stock, due to a simple lack of supply resulting from restrictive planning controls. Retailers, largely because of the high occupational costs involved, are becoming increasingly selective about the space they take up and are adopting a much more cautious approach to expansion. There is an increasing trend again, mirroring trends in the early 1990s, for retailers to retrench into fewer larger stores in major locations, detrimentally affecting secondary towns. (Source: CB Richard Ellis UK Retail Briefing, Issue 1 2007).

3.17 Twenty years ago, "new department stores" requirements were generally for up to 10,000m^2 of space, whereas today the upper end has increased to in excess of 30,000m^2, delivered over large clear floorplates, typically with only two or three levels. The variety store sector has followed the same trend, whilst average unit shop size requirements have doubled over the last 30 years. In summary, our comparison (and indeed convenience) shopping needs are being met in fewer, larger units.

3.18 This trend has also been fuelled by the emergence of requirements for a new type of unit to accommodate the "flagship" stores of key dominant retailers such as Next, H & M, and Gap. The influx of highly regarded international fashion retailers, lead by Spanish operators, has also increased pressure for these large store units. Other overseas retailers are following the lead of these operators, and again this will create further demand for large prime units in top quality centres. In addition New Look announced in October 2005 that they are looking to double the size of their store chain, concentrating mainly on stores over 2,355m^2 .

3.19 Outside the fashion sector, a number of lifestyle and leisure operators such as Heals, Habitat, Borders, and Virgin have also introduced such stores. Requirements for units in the 1,000m^2 to 2,500m^2 range are not uncommon, or up to double this size in the larger and more dominant regional centres and cities. Stores of this size enable retailers to offer a full range of merchandise, and provide a wider range of services such as cafés and listening and reading areas to enhance the shopping experience. As such, these flagship outlets are akin to mini anchor stores and have emerged as a key component of a successful shopping destination today, particularly in regional towns and cities.

3.20 One of the critical elements governing the success of new and existing schemes and centres is their ability to meet these space requirements and provide suitable anchor stores. Conventionally, department stores take space on highly advantageous terms, and unit shopping – which derives trade from footfall generated by anchor stores – underpins the viability of the scheme or centre. As noted above, the size requirement of leading department stores has increased, and this been mirrored amongst supporting retailers and through the emergence of flagship stores operated by leading retailers. In aggregate terms this places a premium on the ability to provide department stores, variety and flagship stores, and unit shops of the size demanded by operators.

3.21 Moreover, and in addition to sheer scale, national multiple comparison retailers have very specific occupational requirements. These reflect their experience of operating effectively around the country and are generally only varied where the market is attractive and there is only a limited supply of suitable premises. Accordingly, the shopping environment, the configuration of the unit, and its location relative to prime pitch and other key retailers will all play an important part. Equally, the key multiple operators increasingly take a strategic view on their representation, recognising that they can reach the majority of the domestic market from as few as 70 stores, and the majority of the most affluent customers from as few as 20 stores.

3.22 Furthermore, in May 2006 the mezzanine legislation came into effect, whereby planning permission is now required for internal retail floorspace over 200m^2. As a result the demand for larger footprint stores is expected to increase further.

Multiple Retailers, Fascias and Formats

3.23 Multiple retailers now dominate the market and account for more than 70% of total non-food spending. However, considerable changes have recently taken place amongst many of the traditional 'high street' fascias, with closures and rationalisation and the emergence of new retailers. For example, Arcadia, whose high street fascias include Top Shop, Top Man, Burton, Dorothy Perkins, Evans and Warehouse rationalised and reduced the number of outlets across the country, although this has now levelled out and recent financial results suggest something of a recovery.

3.24 Other traditional high street favourites have also experienced problems. Allders collapsed on the high street, due to their push towards a younger customer set that was already well served by other retailers, and Index and Littlewoods are set to disappear, having lost out to competitors such as Argos and Bonmarche, who meet customers' needs better (source: Verdict on the High Street, 2005). New retailers are emerging and becoming well established to challenge the old order, with international fashion stores such as Mango and Zara leading the way. Other international names, such as Esprit and Urban Outfitters are also seeking to gain a foothold in the UK. These operators however are typically only seeking representation in larger centres.

3.25 More generally, there has also been a marked expansion in the value-orientated sector, as many workers on the lowest incomes have seen incomes rise, whilst middle class customers feel slightly less confident with the slow down in house price inflation (albeit with a comforting "soft landing" and no sign of a housing slump of the kind seen in the early 1990s). Clothing retailer Primark has signed up to occupy the former Allders store on London's Oxford Street, marking its continuing move away from sites in more secondary locations to higher profile sites in town centres. Other mainstream value orientated retailers who are expanding their portfolio include TK Maxx, New Look, Wilkinsons and Pound stretcher. Many of these retailers also recognise the benefits of trading together both in and out-of-centre.

3.26 The strength of the value sector is highlighted by the performance of Peacocks, who reported strong annual growth in profits (+8%), sales (+11.8%) and like-for-like sales (+13.8%) in their 2005 results. Both the main Peacock stores, and their subsidiary Bonmarche chain, witnessed growth. Overall, this sector is a key growth area offering opportunities for market repositioning within centres, and is extremely popular with the shopping public, both from lower and middle income customer markets.

3.27 As a reaction to the growth in value retailing, middle market operators are segmenting their offer further, providing either more upmarket own brands such as Per Una and Blue Harbour in Marks and Spencer or more heavily discounted offers within stores such as New Look. Diversification into other sectors is also occurring, particularly into homeware. For example Next and Monsoon are placing greater emphasis on 'interior' products.

3.28 In the department store sector, there has been a general renaissance as the age profile of shoppers has changed to present a new, different and expanding audience. Verdict predicts that department stores will account for 13.6% of high street space by 2009, up from 11.1% in 1999. The top-end department stores such as Selfridges and Harvey Nichols have expanded into major regional cities and department stores acting as anchors in pipeline shopping centre developments – John Lewis, Debenhams and House of Fraser – are all planning aggressive expansion over the next 5 years. New store acquisition openings however are primarily restricted to shopping centre developments, as stand alone department store developments are rarely viable, as landowners and developers are prepared to contribute financially in order to secure an anchor tenant that will increase the profile of the development.

3.29 Increasingly, traditional 'high street' retailers are seeking to diversify their formats and provide out of centre facilities. For example, in the last few years Woolworths introduced Big W stores selling a range of home related products. Boots, HMV, and WH Smith are also investing in out of centre retail park stores, although they are finding it difficult to differentiate their offer sufficiently from their high street stores and compete with the leading supermarket operators, and on the whole sell a greater proportion of lower ticket items. Clothing and footwear has also been moving away from the high street and onto out of town retail parks over the last 10 years. Next, for example, is focusing on out of town development, using the Directory and on-line products to stock the larger format, and Matalan has expanded aggressively.

3.30 National, regional and local planning policy continues to resist the development of 'high street' type comparison goods in out of centre locations, with PPS6 objectives seeking to sustain and enhance town centres and to reduce adverse impact from out of centre development on existing centres. However, the market has responded to this restriction by seeking opportunities to secure 'quasi retail park' type developments within or on the edge of defined district centres and suburban town centres where they offer the retailers prominent, highly accessible sites. This can serve to dilute the attraction of higher order centres.

3.31 In the mainstream retail warehouse sector, whilst there has been a slow down in out of centre floorspace development, where opportunities arise, there remains continued pressure for development, and in particular for large store formats. Whilst this, in its own right and in aggregate terms, may have more limited implications for the high street as a whole, it has prompted increasing segmentation within the sector. Other operators have responded by becoming more specialised, for example, B & Q Warehouse and the Wickes brand cater to a greater extent for the "hard" end of the market and trade sales, whilst Homebase and Focus cater for DIY enthusiasts and the "soft" end of the market, including interiors, home wares and kitchen wares. The latter type of operator often sells many goods routinely found on the high street, and in particular within department and lifestyle stores, who increasingly identify retail warehouse operators as key competitors.

3.32 Similarly, the pursuit of significantly larger stores by the leading electrical retail warehouse operators (in particular Comet and Curry's) to enable them to display a comprehensive range of goods, places pressure on the department store sector, and challenges the viability of generalist high street electrical retail. Whilst specialists such as the Sony Centre and Bang & Olufsen continue to perform a niche role, price deflation and non-specialists, including supermarkets and general merchandise retailers such as Argos with a growing out of centre presence, pose a growing threat.

3.33 Finally, a range of out of centre operators in the furniture and home furnishings sectors remain highly acquisitive and, despite a number of setbacks in seeking planning permission for new stores, IKEA continue to strive towards serving sub regional markets. Again, this sector represents a key competitor for department store operators.

3.34 In relation to the food store sector, the stringent key tests of PPS6, restricting the opportunity to build further large superstores, has resulted in intense competition between the biggest supermarkets (Tesco, Asda, Sainsbury's, and Morrison's) to retain or expand market shares. This competition has seen the expansion of the comparison goods areas and emergence of the discount clothing lines and home ware lines within many of the large supermarkets, and the emergence of the home ware store formats, such as Tesco Plus and Asda Living. In addition, Marks & Spencer's are continuing to promote their Simply Food format within both town centre and out of centre locations.

3.35 In summary, rapid change amongst many of the traditional high street fascias, and the emergence of new international brands, is creating new and evolving demands for modern, well configured and appropriately sized space. At the same time, the value oriented sector has expanded rapidly to provide opportunities for market repositioning within centres, and is extremely popular amongst shoppers.

3.36 However, and despite the protection afforded to centres by planning policy, a number of threats remain. Traditional high street retailers continue to pursue large-space formats in out of centre locations, and changes in the retail warehouse sector have created an increasingly competitive environment – particularly for department store operators. Furthermore, it is likely that food store operators are to seek to improve and expand their existing stores, and continue to expand into niche markets, such as motorway services, building upon the petrol filling stations and local shopping style formats.

Growth in Consumer Spending

3.37 This is covered in the preceding paragraphs and also considered in the REASN methodology.

New Technology

3.38 The advent of new technology such as internet or digital television home shopping continues to grow and is making changes to food and convenience goods sales as well as non food goods. Established retailers are increasingly using the internet as a parallel channel for sales. In Great Britain, for example, the percentage of households with internet access has grown from 34 % in the first quarter of 2000 to 52% in the fourth quarter of 2004 (source: ONS). Customers are also becoming more comfortable with making purchases online.

3.39 However, compared with sales levels in shops, online sales remain at a very low level. Verdict predicts that online sales will account for just 5% of all retail spending by 2009. Centres that offer a range of complementary, non-retail attractions or offer a high level of convenient shopping facilities are likely to be more resilient to these changes.

National Leisure Trends

Cinemas

3.40 2001 and 2002 saw rapid growth in admissions figures accumulating in a record breaking 175.9 million in 2002, however 2004 saw a 5% decrease, which was the first decrease since 1999, despite the number of films increasing from 369 in 2002 to 439 in 2004.

3.41 Despite the slight slowing down of consumer spending, Mintel forecasts that the value of the cinema market will increase by 24% between 2006 and 2011, taking it to £1.3 billion. However, when taking the effects of inflation into account, this equates to a real growth of 5% and a value of almost £1.2 billion by 2011 (Source: Mintel Leisure Intelligence, April 2006)

3.42 Mintel state that the outlook for the cinemas market will remain a positive one up to the year 2011, as it is set for a steady increase of approximately 5% each year in real terms. It is forecast that secondary revenue will rise faster than box office with a 36% increase over the five year period, which equates to 18% in real terms making the market worth £380 million by

2011.

3.43 Achieving these attendance levels will, however, require continued investment in physical facilities, customer service and marketing in order to maintain the growth and consumer interest. The introduction of digital technology will contribute towards this growth, broadening the film offer for consumers.

Ten Pin Bowling

3.44 The tenpin bowling market increased in value by 17% between 2001 and 2006, taking consumer spending at centres to £273 million a year. Mintel predict that the industry will experience a period of gradual growth in the near future with a number of investments taking place resulting in the market value increasing at a rate of 3% in 2006.

3.45 As with many areas of leisure, tenpin bowling has benefited from the relatively healthy state of the UK economy in recent years, with increases in personal disposable income and consumer expenditure.

3.46 Tenpin bowling is considered a discretionary spend and can be enjoyed with a relatively small outlay compared to other popular leisure pastimes such as eating out.

3.47 Since 2004, the number of tenpin bowling centres in the UK has increased from 285 to 310 and there are positive signs for the future with a new stream of investment taking place providing more attractive and innovative centres to help rejuvenate the industry.

3.48 Mintel forecasts that tenpin bowling expenditure will increase 18% in current terms over the next five years, reaching £322 million by 2011. However, when the effects of inflation are taken into consideration, this equates to a decline of 2%, reaching just £267 million.

3.49 In order to enhance profits, tenpin bowling will need to provide new locations and designs and encourage both young and old to take up the sport.

Health and Fitness

3.50 Almost 12% of the UK population are registered members of a health and fitness club or publicly-owned fitness facility. This equates to the UK's £3.6 billion fitness industry, a peak for its 20 year history. Like-for-like membership has growth by 3% since 1st January 2006, and over 230 new public and private fitness facilities have been added to the industry's portfolio. (Source: Fitness Industry Association, 2007 FIA State of the UK Fitness Industry Report).

3.51 Supported by Government initiatives, it is likely that there will be continued growth and demand for health facilities together with a further consolidation in the private sector and or the development of more diverse membership schemes.

Bingo Halls

3.52 The bingo industry is at a crossroads in 2007, as it faces the threat posed by the smoking ban and the changes to the gambling laws set out in the Gambling Act 2005. Nearly half of regular bingo players are smokers, compared with a quarter of the UK population overall.

3.53 Consumers spent an estimated £2.8 billion in bingo clubs in the UK in the year to March 2007 and this is expected to fall to around £2.5 billion in 2008.

3.54 Data from the Gambling Commission and Mintel identify that an average of 17 clubs closed each year in the decade to 2004 and the closures have become more frequent since then. The Bingo Association claims that as many as 200 clubs could close as a result of the combined effects of the smoking ban and double taxation.

3.55 Taking a wide range of factors into account, Mintel forecasts that admissions to bingo halls could decline by as much as 28% overall to 56 million over the 2007-12 period, with revenues down by a similar proportion to just over £2 billion.

3.56 It is unlikely that there will be further investment and development of Bingo Halls within the catchment in the current market climate. This emphasises the need to protect the existing Gala Bingo in sites within the study area.

Tourism Trends

3.57 Tourism represents a key revenue generator for the UK economy and for the South West in Particular. The volume of inbound tourism in 2008 is forecast to be below that achieved in 2006. These forecasts, which will be revised in May 2008, suggest that the second half of 2007 and early 2008 are likely to witness falling visitor numbers, but that the first signs of recovery will be evident by the middle of next year. Historical trends would suggest growth of three to four percentage points per annum, but given the current global economic climate a growth of just 2% in arrivals is expected, with value static in real terms. This is an aggregate forecast, and as such different markets or market segments may see faster or slower growth than 'average' for all markets taken together.

3.58 Tourism is a very important component of the region's activity and its economy. It represents about 10% of the areas GDP. The regional tourism strategy 'Towards 2015: Shaping Tomorrow Tourism (2005) identifies three priorities: Sustainable Tourism, Increased quality, and improved destination management arrangements.

3.59 The Government's Good Practice Guide on Planning and Tourism (May 2006) recognises the economic value of tourism and the importance of an appropriate strategy to be established within the LDF.

3.60 The geological, landscape and nature conservation assets form the principal attractions to the area. The designation of the Dorset and East Devon Coast as a world heritage site, due to its outstanding geology provides a significant boost to the area.

3.61 The two districts also offer a range of services to encourage tourism to the area. Weymouth benefits from its seaside location while Dorchester's historical origins attract people inland.

3.62 Weymouth has also been chosen as an Olympic Sailing venue for the 2012 Olympic Games, which will be held at the Weymouth and Portland National Sailing Academy. Weymouth and Portland's waters have been credited by the Royal Yachting Association as the best in Northern Europe.

3.63 Further details of the cultural and tourism provision within both centres will be given within the next section which makes an assessment of the health of the towns.

4

THE VITALITY AND VIABILITY OF THE TOWN CENTRES OF WEYMOUTH AND DORCHESTER

CB RICHARD ELLIS

THE VITALITY AND VIABILITY OF THE TOWN CENTRES OF WEYMOUTH AND DORCHESTER

4.1 In this section of the report, we undertake a health check in order to consider the vitality and viability of Weymouth and Dorchester town centres, drawing on the indicators set out in paragraph 4.4 of PPS6.

4.2 Our assessment has been informed by a combination of *'desk based research'*, *'on the ground observations'* and the utilisation of empirical research (i.e. household survey). The site visits were made on weekdays during October 2007.

4.3 In particular we have drawn upon Experian GOAD data. The GOAD data maps broadly follow the town centre boundaries given within the respective local plan proposal maps. In addition, we have relied upon available in-house data provided by the two Councils, together with other research resources such as Promis and Focus Centre reports. This has been supplemented where necessary by in house advice from our Agency team. The GOAD Reports for Weymouth and Dorchester town centre are provided in Appendix 1.

Regional Context: Weymouth and Portland, and West Dorset

Weymouth and Portland Borough Council

4.4 Weymouth is a town in Dorset, situated on a sheltered bay at the mouth of the River Wey on the English Channel coast. The town is 8 miles south of Dorchester and 5 miles north of the Isle of Portland. The A354 road bridge connects Weymouth to Portland, which together form the borough of Weymouth and Portland. The administrative area of Weymouth and Portland covers some 20 square miles including an island the Royal Manor of Portland (4.5 sq miles). The main town Weymouth has a forecast population of approximately 55,000 in 2007 with a further 13,000 people in Portland (based on 2001 Census and Map info projections).

4.5 Weymouth and Portland's administrative boundary is defined by the sea to the south. To the north is the District of West Dorset.

West Dorset District Council

4.6 West Dorset District covers a rural area comprising six towns, Dorchester, Bridport, Sherborne, Lyme Regis, Chickerell and Beaminster, as well as surrounding rural parishes. Dorchester has been the county town of Dorset since 1305. The town is located to the south of the River Frome and to the north of Weymouth, between Bridport to the west and Bournemouth and Poole conurbations to the East. To the south of Dorchester town and north of the urban area of Weymouth is open countryside designated as Dorset Area of Outstanding Natural Beauty.

4.7 In 2001 the town had a population of 16,171 and a catchment population of approximately 40,000. Dorchester is the principal service centre to the district. The town is located on the convergence of the A35 Trunk Road (leading east to Bridport and west to Poole), A352 (leading north Sherborne), A354 (leading South to Weymouth) and A37 (north west to Yeovil). The road network provides the main link to the surrounding rural towns and villages.

Sub-regional Context

4.8 Weymouth and Portland Borough and West Dorset District sit broadly mid-way between the regional shopping centres of Southampton and Cribbs Causway Bristol. To the east, the Bournemouth- Poole conurbation functions as a sub-regional centre. Both Weymouth and Dorchester function as sub-regional level town centres and perform localised roles to their catchments.

4.9 The table given on the next page indicates Weymouth and Dorchester's position within the sub-region based on the Top 30 Centres according to Venue score in 2006. Javelin Group's VenueScore provides an up-to-date ranking of UK shopping venues across a number of key indicators - scale, market positioning, fashionability and age positioning of the retail offer.

4.10 The score attached to each operator is weighted to reflect the overall impact on shopping patterns. For example, anchor stores such as John Lewis, Marks & Spencer and Debenhams receive a higher score than unit store retailers to reflect their major influence on shopping patterns. The resulting aggregate score for each venue is called its VenueScore.

4.11 The table given on the next page indicates the VenueScore rank for both Weymouth and Dorchester.

Venue Score for Weymouth/Dorchester

Cheltenham	1	Weston Super Mare	16
Bath	2	Barnstaple	17
Bristol Broadmead	3	Weymouth	18
Exeter	4	Bristol Clifton	19
Salisbury	5	Cirencester	20
Plymouth	6	Dorchester	21
Swindon	7	Newton Abbot	22
Cribbs Causeway	8	Bridgewater	23
Bournemouth Central	9	Trowbridge	24
Taunton	10	Yate	25
Gloucester	11	Penzance	26
Torquay	12	Chippenham	27
Poole	13	Falmouth	28
Yeovil	14	Swindon Factory Outlet	29
Truro	15	Tiverton	30

Source: VenueScore 2006

4.12 The town with the highest rank within the South West is considered to be Cheltenham. Weymouth is ranked at 18th place, above Dorchester (21st place). Both Weymouth and Dorchester are also ranked below nearby centres of Bournemouth (9), Poole (13) and Yeovil (14). It is evident that Bournemouth, Poole and Yeovil are strong retail destinations, which perform a '*higher order*' function. The household survey confirms that expenditure particularly from Zone 7 Sherborne leaks to Yeovil.

4.13 It is also relevant to consider the relationship between Weymouth and Dorchester. Historically the two centres have performed competing roles, but this situation is changing as development has come forward over the years and the centres provide similar services. Proposals for retail development will further strengthen the centres, although the results of the household survey suggest that the two town centres do not compete directly with each other. A full assessment of the retail characteristics of Weymouth and Dorchester is given below. Further information on the relationship between the two towns as well as details of the key competitors within the surrounding area is given in section 6 within the findings of the household survey.

Weymouth Town Centre

4.14 Weymouth is a popular town, strongly characterised by its port and coastal location. Its mix of port, marina, coast frontage, streets and public spaces create a strong sense of place and generates a high level of activity in the centre. As a result the town has developed as an important tourist destination, employment and retail centre.

4.15 Weymouth Bay and Portland Harbour are widely recognised as the finest sailing waters in the UK. This together with the development of the new purpose built, on-shore facilities have resulted in the Weymouth and Portland National Sailing Academy being selected as the venue for the London 2012 Olympic sailing events. To accommodate this, the South West Regional Development Agency has secured planning permission to develop a new 600 berth marina adjacent to the Weymouth National Sailing Academy, which will include a fuel berth, travel hoist, space for chandlery, a brokerage, marine engineers as well as a new bar and restaurant.

4.16 Weymouth has a large town centre formed by a grid like pattern of streets. The core retail area as referred in the Local Plan comprises New Bond Street, St Thomas Street and St Mary’s Street which are largely pedestrianised. The centre itself has a mixed character. The majority of the town centre is dominated by the older buildings, typically offering fairly small retail units. Recent new development at New Bond Street (2001), which comprises a Debenhams and other national multiples, along with a multi-storey car park and cinema, integrates well with the historic core.

4.17 Along the seafront The Esplanade provides for service related uses, together with independent retailers targeting the tourist trade. The Council recognise that the Esplanade and seafront are a major tourism resource. Weymouth's Esplanade will be redeveloped in time for the 2012 Olympic Games. Planned improvements to the Esplanade include a new public square around the statue of George III, the restoration and extension of the Art Deco pier bandstand, a Tourist information centre and café, Victorian style shelters and seasonal kiosks, a Beach Rescue Centre, and a sand art pavilion. Other alterations to the promenade are considered, particularly around key areas such as the Jubilee Clock and the Pier Bandstand, including a new lighting scheme and a series of seating areas with planting, fountains and structural trees. Proposals are scheduled to undergo a period of public consultation before accepted improvements. It is hoped that works will begin in 2008.

4.18 The western periphery of the centre fronts the bridge and harbour side and is dominated by hotels, restaurants, cafes and bars. The Great George Street/Westham Street area is a secondary retailing area, with mostly independent traders. Above all, the historic character of the centre is defined by being fairly compact in nature, with a typically moderate scale of buildings. A new Weymouth Relieve Road has planning permission and it is expected that construction of the road and associated park and ride site will being in 2009. It is expected this road will considerably improve access to Weymouth town centre.

4.19 In addition on the outskirts of the town centre, there are also plans for the Weymouth Pavilion, Ferry Terminal and 4 hectares (10 acres) of its surroundings to be entirely redeveloped. The Pavilion theatre is located on a peninsula of land, reclaimed from the sea, between Weymouth Harbour and Weymouth Beach and Esplanade. The planned complex is to include a refurbished theatre, a World Heritage Site visitor centre, a new ferry terminal, a 120–150 bed 4-star hotel, an undercover car park, a shopping arcade, offices, luxury and low cost apartments, houses, public squares, promenades, and a marina. Drivers Jonas are due to submit a planning application shortly for their scheme which comprises approximately 60,000 sq ft of 'lifestyle' retail linked to the marina. Subject to review of a detailed planning application, this proposal is unlikely to impact negatively on the town centre and, indeed, will have positive benefits by creating another visitor attraction for Weymouth.

Diversity of Main Town Centre Uses

4.20 New Bond Street and the central section of St Thomas Street are dominated by key multiples including Debenhams, Monsoon, Superdrug, Peacocks, WH Smith and Boots reflecting the prime retail area. Independent retailers and discount stores such as Bon Marche and Wilkinson are located in the more secondary trading locations, such as Westham Road and Great George Street. There are also a number of charity shops along the southern section of St Thomas Street and St Mary's Street.

4.21 Situated on a car park within the outskirts of the town there is a weekly market on a Thursday. This provides a range of clothes, shoes, fruit and vegetables. Although the market adds to the vitality of the area, the impact this has on the town centre is limited due to its location on the edge of the town. Nevertheless it is likely to provide some linked trips.

4.22 The town does offer a diverse range of independent retailers and smaller comparison retailers some of which offer high order goods such as Ocean to Earth Clothing, Henri Lloyd and Animal Clothing. These independent retailers add considerable diversity and attraction to the centre and are often associated with sailing centres.

Retail and Services Provision in Weymouth by Number of Units

Retail Category	No. of Units	% of Total	National Average %	Variance %
Convenience	12	3.9	9.0	-5.1
Comparison	137	44.9	45.5	-0.6
Service	152	49.8	33.0	16.7
Vacant	4	1.3	10.9	-9.6
TOTAL	305			

Source: GOAD Experian Report 2006. CBRE Centre Survey 2007.

4.23 The town centre contains a total of 305 units. Almost half of these comprise service related uses such as beauty salons, restaurants, and banks. This provision is 16% above the national average in terms of the unit retail split, and arguably representation is higher than may ideally be desired. The comparison offer provides just under half of the overall provision, with 137 units and is marginally below the national average at (-0.69%). Generally, larger towns with a higher proportion of comparison outlets are regarded as being healthier. This is particularly the case for centres such as Weymouth which are fulfilling longer term shopping needs. There are 12 convenience providers within the town which form only 3% of the total number of units. This is again significantly lower than the national average of 9.08%, an increase in representation in this sector would therefore be welcomed. However, it is noted that several convenience providers operate stores either at edge of centre or out of town locations, including Morrison's (3,252 sqm net), Asda (2,485 sqm net), Lidl (836 sqm net), Aldi (650 sqm net) and Somerfield (1,463 sqm net). These stores draw the majority of convenience trade due to their size and range of provision, as well as ease of access and car parking. If this trend is to be reversed and Weymouth town centre's convenience market share improved, development within existing centres should be encouraged.

4.24 The floorspace occupied by various retail categories within Weymouth town centre (see table over page) follows a similar pattern to that identified above, with the service and comparison offer dominating. Arguably, this reinforces the view that there may be scope to increase the convenience offer within the centre. This also shows that a higher proportion of floorspace is given over to comparison retailers, reflecting a continuing multiple retailer occupier trend to occupy and demand larger shop units. In that respect, the amount of floorspace provided for comparison goods suggests a reasonably healthy centre. Another indicator of the health of the centre is the low level of vacant units and floorspace. We discuss this in more detail later in this section.

Retail and Services Provision in Weymouth Town Centre by Floorspace

Retail Category	Floor Space (sqm)	% of Total	National Average %	Variance %
Convenience	2,722	6.2	16.6	-10.4
Comparison	28,029	64.3	51.2	13.0
Service	11,864	27.2	21.6	5.5
Vacant	957	2.1	9.2	-7.1
TOTAL	43,572			

Source: Weymouth Experian GOAD Report 2006.

4.25 A more detailed breakdown of the retail sub-sectors has identified a number of additional points:

- **Groceries and frozen foods –** The Experian GOAD data indicates that there is a significant under-representation in this category. Currently, the only large food stores within the town centre is a moderate sized Tesco (403 sqm net) and Iceland located at St Thomas Street, as well as a Marks & Spencer food hall (Approx 450 sqm net) at St Mary's Street. It should be noted that these providers offer a reasonably good variety and quality of food goods, including fresh foods. The Tesco store also acts as a strong anchor toward the west of the centre. Notably, there is a fairly low representation of independent butchers and greengrocers within the centre, albeit that this is not uncommon for centres of a similar scale to Weymouth.
- **Variety, department, clothes retailers and catalogue stores –** Weymouth town has a marginal under representation of these types of stores with Debenhams, Marks & Spencer's, and Wilkinson being the main retailers. In addition to a number of clothes fashion retailers such as Monsoon, New Look, Topshop and Dorothy Perkins. These major stores are acknowledged to be key shopper attractors. While, ideally, the town would benefit from an increased representation in this sector, the demand from these multiple retailers for larger sized units may make this a challenging ambition unless a comprehensive development provides suitably sized units, and a scheme of sufficient critical mass. Conversely however, the limited unit size has probably helped a good number of independent stores locate in the town.
- **Restaurants, cafes and fast food –** The representation of this sector is well above that of the UK average, which can be expected for a town which also serves as a tourist base. Such uses, and particularly restaurants/cafes, can considerably aid the diversity within a town centre, increase dwell times, i.e. resulting in visitors staying longer in the centre and adding to the overall shopping experience. Weymouth's service provision is understandably clustered around the streets close to the sea side and Quay, and within the older part of the town. There are also several modern public house developments along St Thomas Street close to New Bond Street and the cinema. Starbucks Coffee has now been opened in New Bond Street. This sector has seen considerable growth in recent years.

4.26 In terms of other town centre uses, Weymouth has a fairly good provision of entertainment and cultural facilities. Many of these are dispersed around the edge of the town centre such as the Sea Life Centre, Pavilion Theatre, Royal Manor Theatre, Gala Bingo Club and Weymouth Museum. In the town centre itself, there is one multi-screen cinema and a bowling alley to the south of New Bond Street. There are also a few amusement arcades along the Esplanade. The Pavilion Theatre is located on the edge of the town centre near to the ferry terminal. Generally, the entertainment and cultural facilities are clustered towards the western side of the centre.

4.27 Tourism has been the largest industry in Weymouth for decades, although this has declined slightly since a peak in the late 1990s. There are nearly a hundred events held throughout the course of the year in the borough, including beach volleyball, handball, motocross, and the annual carnival in mid-August, which attracts around 70,000 people each year. There appears to be a good provision of hotel accommodation within the centre. These are predominantly located along the Esplanade or near to the seafront, Quay or Marina. If a hotel opportunity were to become available, this might appeal to the budget or boutique market.

4.28 Office provision is also reasonable; in the main these types of uses are located above shops or on the edge of the town centre, meeting the requirements of local professional providers. Rents are however fairly low, making the project of delivering the viable office development much more challenging. Large scale office accommodation is provided on the edge of the town at the Jubilee Enterprise Centre and Southwell's Business Park.

4.29 From our site visits, there appears to be a fairly limited residential stock within the town centre itself; residential uses can add significant vibrancy to the town centre, add to its diversity and increase footfall. Residential uses can also make better use of upper floors. Where development opportunities arise, the Council might be minded to encourage more mixed use schemes, including residential and possibly to enhance the financial viability of proposals.

Retail Commitments

4.30 In terms of development coming forward, the table below identifies the current retail planning commitments within the Borough of Weymouth and Portland.

Name	Location	Date Of Consent	Planning Application	
Wm Morrison's	244 Dorchester Road Weymouth DT3 5AX	05/08/2003	02/00394/FUL	771sqm Sales extension (To be implemented by December 2008) 283 sqm Warehouse extension - completed
New Look	Off Chandler Close and Souter Way Mercery Road Weymouth	29/08/2007	07/00442/OUTES	Non Food Retail (A1 Use) Maximum gross external floorspace = 7,300 sqm
Wickes DIY	Off Tecan Way Granby Industrial Estate Weymouth (West Dorset District Council area)	16/07/2007	1/E/06/00576 OUTLINE	Class A1 Retail Store (Wickes DIY) 2,783 sqm gross + 483sqm outdoor project area (Detailed planning application submitted 07/12/2007)

Retail Commitments within the Weymouth Area

Source: Weymouth Borough Council 2007

4.31 It is apparent from this table that the location of all of the commitments are for further floorspace outside of Weymouth town centre, either in the form of extensions to existing stores or by the development of a new terrace of retail units such as that proposed by New Look.

4.32 It is noted that the planning application obtained by New Look is for a new terrace of 4-6 retail warehouse units for retailers offering goods such as, furniture and furnishings, carpets and floor coverings, electrical, pet related goods, DIY goods, motor accessories, and cycles. These units will form part of a comprehensive development including a new European Headquarters Office for New Look, further employment uses, and a range of community uses including a medical centre, vets practice, nursery and hotel.

4.33 Although not a commitment, Asda sought to promote the out of centre Wessex Stadium site as a suitable location for the relocation of their store in Newstead Road. The Inspector concluded that the site was not sequentially preferable and recommended against the site allocation in the Local Plan.

4.34 Based upon the findings of our capacity exercise (Section 7) we undertook a sequential assessment of sites in Section 9. Planning Policy Statement 6 (PPS 6) is clear that when need is identified local planning authorities should plan positively for it in their development plan documents. Out of centre locations, including the Wessex Stadium site should only be considered when all town and edge of centre options have been exhausted. At this time it is inappropriate to consider such sites.

4.35 Furthermore, pre application advice is currently being sought by Tesco who are seeking planning permission for a 2,860 sqm supermarket at Bottomcoombe, Easton on the Isle of Portland. The Council's consultants DTZ are currently reviewing this application. Whilst it is not part of our brief to critique this application, a modern food store within Portland could substantially reduce the need for residents to travel from the area to undertake their main food shopping. However, the likely impact of the proposal on existing stores in particular the co-op supermarket at Easton will need to be carefully considered. In addition to demonstrating a quantitative need for the proposal, and that it would not have an adverse impact on existing food store provision, it would also be necessary to demonstrate that there are no more sequentially preferable sites available in or on the edge of the centres in Portland.

Retailer Representation

4.36 Another good indicator of the strength of the centre is to examine multiple retailer representation. According to the Experian GOAD report, a multiple retailer is defined as being part of a network of 9 or more outlets. The presence of multiple outlets can enhance the appeal of a centre to shoppers. In September 2006, of 30 identified key multiples, 20 were found within Weymouth, (Experian GOAD, 2006). This figure is consistent with our updated 2007 centre survey and represents a good representation of multiple retailers.

4.37 The table below identifies 'key' multiple retailers in Weymouth as defined by Experian.

Key Multiples Retailers defined by GOAD

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

Source: Experian GOAD, 2006

4.38 The Property Market Analysis (PMA) Promis Report 2007 identifies towns in terms of their fashion rank. Weymouth is at 143rd place out of the top 200 town centres in the UK. This ranking suggests that while Weymouth is performing fairly well, any scope to improve the extent and quality of fashion retailers would be expected to strengthen the town. This is clearly evident by the new floorspace provided in Bond Street occupied by Debenhams, New Look, and Monsoon, as well as the centre ranking given by VenueScore. It is also shown by the increase in rents and yields over the recent years since the development at Bond Street in 2001. Nevertheless, Weymouth remains to offer relatively little by way of quality fashion outlets (albeit that the concession store nature of Debenhams somewhat offsets this), and provides a greater representation of discount fashion retailers than might ideally be desired.

4.39 The importance of independent retailers should also not be understated. They can provide diversity to a centre's overall offer, and help to resist the wholesale homogenisation of retail areas – a current concern arising from recent UK retail trends. Therefore, Weymouth should seek not only to provide opportunities to attract new national retailers, but also to ensure that suitable locations – such as around Great George Street– are available for independent retailers. Typically, independent retailers seek small units at more affordable rents than available in prime pitch areas. Independent retailers can create a significant differentiation to other competing centres, especially if set within a high quality urban environment, as part of a wider town centre retailing mix.

4.40 As expected, independent retailers are primarily located in secondary locations within Weymouth. In some areas (such as the streets linking up to the Esplanade), the quality of the environment of these areas is reasonably attractive, and benefits from the historic architecture and narrow streets which together provide an individual character.

Retailers' Requirements for Weymouth Town Centre

4.41 The level of retailer demand to locate in Weymouth provides another good indication of the centre's health. According to Focus, in total, 44 retail and service businesses have expressed a demand for floorspace within Weymouth (Appendix 9). Demand is strongest from the comparison sector. Such operators include, TK Maxx, Brantano, Dreams Plc, Robert Dyas, Tchibo UK Ltd and Moss Bros. There is also considerable demand from service sector retailers such as Pizza Hut, Pizza Express, Harvester and Ask.

Retailers' Requirements for Weymouth (September 2006– Sept 2007)

Category	Requirements	Minimum Gross floorspace Sq ft (sqm)	Maximum Gross floorspace Sq ft (sqm)
Comparison	32	143,672 (13,399)	181,891 (16,901)
Convenience	-	-	-
Services	12	56,869 (5284)	96,249 (8998)
Total	44	200,541 (18,630)	278,140 (25,839)

Source: Pipnet/Focus 2007

4.42 It should be noted that generally main supermarket operators and small independent store operators do not post their requirements on databases such as Pipnet and Focus. In part, this may explain why there are no requirements identified for the convenience sector.

Shopping Rents

4.43 The level of rent that retailers are prepared to pay for space in a centre is an indication of the perceived attractiveness of that centre. Rental values can also provide a measure of the primacy of streets and locations within a centre. The table below examines the Prime Zone A, retail rents in Weymouth and compares these to other competing centres.

Prime Zone A Retail Rents £ per Sqm (Sq ft) Weymouth and Competing Centres (2000-2006)

Centre £sqm (£ft^2), Zone A	Jun 00	Jun 01	Jun 02	Jun 03	Jun 04	Jun 05	Jun 06
Poole	1,130 (105)	1,130 (105)	1,130 (105)	1,230 (115)	1,230 (115)	1,290 (120)	1,290 (120)
Weymouth	700 (65)	700 (65)	750 (70)	750 (70)	750 (70)	810 (75)	810 (75)
Bournemouth	1,615 (150)	1,615 (150)	1,720 (160)	1,880 (175)	1,990 (185)	1,992 (185)	2,045 (190)
Dorchester	645 (60)	645 (60)	645 (60)	700 (65)	750 (70)	810 (75)	810 (75)
Yeovil	750 (70)	750 (70)	750 (70)	750 (70)	810 (75)	860 (85)	970 (90)

Source: Focus Report 2007.

4.44 Since 2000, Weymouth's prime retail rent has risen and now stands at £75 per sq ft Zone A. Rental growth since 2000 has been seen across all of the other competing centres as shown in the table above. The development of larger, modern retail units at Bond Street as well as the out of centre Jubilee Retail Park is likely to have assisted the town's rental values. Nevertheless it is clear that Weymouth must continue to bring forward development which meets the needs of modern retailer brands in order to compete. As would be expected, the centres of Poole and Bournemouth command a far higher Prime Zone A retail rent than Weymouth, reflecting the scale and status of these centres.

Commercial Yields

4.45 The commercial yield on non-domestic property is an indication of the confidence of investors and the rental growth potential of a centre. However, it does require careful analysis and its limitations must be understood. In broad terms, the yield on a property investment represents a return (in the form of a rent) on capital to an investor. The greater prospect of future rental growth, the lower the initial yield which an investor will be prepared to accept. Conversely, a higher yield affects a lower expectation of the future rental growth prospects. Yields are therefore an indicator of expectations of rental growth and the general economic prospects for a retail centre. The table below compares the prime shopping centre yields for Weymouth with other competing centres.

Prime Retail Yields % (2001-2007)

	April 01	April 02	April 03	July 04	July 05	July 06	July 07
Poole	7.25	7.25	7.00	7.00	7.00	6.50	6.00
Weymouth	7.50	7.25	7.25	7.25	7.25	6.50	6.50
Bournemouth	5.50	5.75	5.50	5.50	5.50	5.50	5.00
Dorchester	6.25	6.25	7.00	7.00	7.00	6.50	6.50
Yeovil	7.50	7.50	7.00	7.00	6.75	5.50	5.00

Source: *Valuation Office Market Report July 2007.*

4.46 Prime retail yields in Weymouth have continued to sharpen since August 2001. This trend has generally been seen across the UK. Perhaps of more importance is to consider the prime retail yield for Weymouth in the context of other competing centres. In that respect, Weymouth has a yield equal to Dorchester. As would be expected lower yields are achievable in Poole and Bournemouth, indicating that these are stronger retailing destinations. Overall, the retail sector continues to be seen as a strong investment prospect, with potential for good rental growth in the future albeit that recent economic circumstances have slightly tarnished this expectation.

Vacant Retail Property

4.47 The proportion of vacant street level property provides a strong indication of the health of the town centre. It should however be considered with a degree of caution as vacancies can arise even in the strongest town centres, particularly where properties are undergoing alterations or extensions. In addition it is also important to consider this along side the qualitative provision of a town as units may be let for a low rent, for example to charity shops.

4.48 From our centre survey, we have identified four vacancies across the town centre which comprises 1.3% of the town's units. This is far lower than the national average of 10.9%. Previously, the GOAD report conducted in September 2006 identified 11 vacant units. Therefore, there has been a significant reduction in vacant units in the last year. (NB – we are aware that since the centre survey was undertaken in October 2007, vacancy rates have risen to around 15-20 units)

4.49 At the time of the October 2007 survey the four vacant retail units identified are dispersed throughout the town and no particular clusters were identified. Such a low vacancy rate suggests a healthy centre, with good demand from retailers to take up space. The low vacancy rate does however mean that it is difficult to satisfy future retailer demand and could constrain the growth of the centre.

4.50 Furthermore the vacant units were of small unit sizes which are not favoured by national multiples, who prefer larger floor plates (especially comparison operators).

Pedestrian Flows

4.51 Pedestrian flows are a useful indicator of the relative strengths of different parts of the town centre. Essentially, the pedestrian flows throughout the town centre would be expected to mirror the primacy of the streets in terms of the strength of their retail environment.

4.52 From our observations the centre has good pedestrian flows in the main pedestrian areas of New Bond Street, along St Thomas Street and St Mary Street. Reasonable pedestrian flows also arise from the main shoppers' car parks, such as along Commercial Road and through the Colwell Shopping Centre. As would be expected, the secondary trading locations, including Great George Street and St Edmund Street pedestrian flows are weaker. Overall, the level of pedestrian flow in the centre is good, resulting in a fairly vibrant destination.

Accessibility

4.53 Weymouth town centre benefits from good linkages to the major arterial road network, leading north to Dorchester & South to Portland on the A354, east to Preston on the A353 and west to Bridport on the B3157. Weymouth is therefore considered fairly accessible location for those travelling by car.

4.54 In the 1980s the town centre was bypassed by the A354 to Portland, but the Government's road building policy changed before the proposed relief road could be completed. The busy A354 follows its original route through Upwey and Broadwey, where traffic problems are common at peak tourist times. The relief road was held up by opposition from residents and environmental groups, however Dorset County Council have now granted planning permission for a modified proposal including a single carriageway running 4 miles north, and a 1000 space Park-and-Ride scheme. Work is planned to be completed in three years, in time for the 2012 Olympic sailing events.

4.55 The town centre also benefits from a rail station located on the edge of the town centre to the north. Regular First Great Western and South Western services operate from Weymouth with fast connection times to the east and west, as well as a direct train every 20-40 minutes to London Waterloo.

There are plans to improve the services particularly north to Bristol in time for the Olympic Games.

4.56 Weymouth also benefits from a number of centrally located bus stops, the most popular appeared to be those surrounding Kings Statue (The Esplanade) and at the New Bond Street development in the centre of the town.

4.57 Bus services run from Weymouth to Portland, Dorchester, Bournemouth, Wool, Beaminster, Axminster, other villages and to the town's Holiday Parks. In addition Weymouth is connected to towns and villages along the Jurassic Coast by the Jurassic Coast Bus service, which runs from Exeter to Poole, through Sidford, Beer, Seaton, Lyme Regis, Charmouth, Bridport, Abbotsbury, Weymouth, Wool, and Wareham. This service is convenient for walkers who can ride the bus to or from a walk along the coast.

4.58 The main bus interchange is located on the Esplanade, however there are plans to relocate this to a new transport interchange at Weymouth Railway Station. The locations of the bus stops make Weymouth town centre a relatively permeable destination for those using public transport. Shopper permeability is also assisted by the fairly compact nature of the centre.

4.59 The level and distribution of parking within a town centre is an important accessibility factor. The car parks are generally well placed predominantly around the edge of the town centre to the north and west. This is complemented by a short stay on-street parking along the Esplanade and a number of other secondary streets. The parking areas encourage shoppers to feed into the centre from a range of locations. Car parks are mostly surface (the exception being the multi-storey car park at Bond Street) and this is also generally seen to be more attractive to shoppers than multi storey provision.

4.60 For pedestrians, the fairly tightly woven network of streets in Weymouth town centre improves connectivity. In addition, New Bond Street, St Thomas Street and St Mary Street are all pedestrianised. This provides for a safe pedestrian environment along the key retailing streets. The narrow streets to the south which are open to vehicles naturally limit traffic speed while allowing access for those servicing the units. In more secondary areas, the centre is served by a reasonable number of pedestrian crossings, although any improvement to the pedestrian environment in these areas would undoubtedly be welcome.

Environmental Quality

4.61 Environmental quality of a shopping centre is becoming an increasingly important factor in the attractiveness of a centre. A high quality environment can set centres apart from their competition. To assess the state of the environment in Weymouth town centre a survey was undertaken of the main shopping streets/areas. Ten environmental features were assessed within these areas, and the features rated on a scale of 1 to 5, where 1 is very poor and 5 is very good. On this basis, 3 represent a 'neutral' or 'fair score'.

4.62 The table below describes the results for the town centre as a whole, based on the scoring criteria:

Weymouth Town Centre Environment

Criteria	Average Score
Condition of carriageway	3.5
Seats, planters, hanging baskets, water features, public art (paintwork, broken, uneven, parts missing, not working, badly sited, not present)	3.0
Public Facilities, telephones, bus stops/shelters	2.8
Incidence of graffiti, fly posting, vandalism	4.3
Market stalls and street traders	N/A
Barriers to movement	3.3
Cycle parking	2.8
Maintenance and repair of buildings, shop fronts and canopies	3.5
Personal security and police presence	3.8
Wheelchair access and facilities for the blind and partially sites	3.3
OVERALL SCORE	3.3

Source: CB Richard Ellis 2007.

4.63 As a whole, our environmental rating for Weymouth town centre is considered 'fair to good'. In most cases, the individual criteria were scored as 'fair' or above.

4.64 A more detailed review on an area-by-area basis highlights where, in our opinion, some streets are of a higher environmental quality than others.

4.65 This is based on four broad survey zones, as shown in the table below.

Average Environmental Quality Rating by Area

Area	Average Rating
New Bond Street/St Thomas Street / St Mary's Street	3.6
West of St Alban Street	3.1
George Street, Westham Street.	2.8
Maiden Street/New Street The Esplanade	3.6

Source: CB Richard Ellis 2007

4.66 The areas attracting the highest score are the St Thomas Street/St Mary Street/New Bond Street area. The Esplanade area also scores equally high. More secondary areas, such as George Street receive a lower rating. We describe each of these areas in more detail below.

New Bond Street/St Thomas/St Mary Street

4.67 This area is regarded in the Local Plan as the core shopping area. The recent development and modernisation of the New Bond Street has resulted in good quality and an attractive shopping area. Even so, the streetscape could be made more attractive with the provision of additional outdoor seating thereby creating a more vibrant social point. Nevertheless this pedestrian area appears well managed and is of reasonable quality. Therefore, this area received the highest rating of the areas surveyed albeit that there is scope for improvement.

4.68 Although some limited environmental/streetscape improvements have been made to St Thomas and St Mary's Streets and they offer a fairly clean environment, the general urban fabric is less enticing. While this area benefits from a good mix of architectural quality in some cases the shop fronts are poorly maintained and in need of refurbishment. The pedestrianised nature of the area does however enable shoppers to move around easily and significantly enhances the retail environment.

West of St Alban Street

4.69 The area to the west of Alban Street offers a diverse range of uses. This includes a mix of multiple and independent retailers, as well as a strong representation of leisure related and evening economy uses. The environmental quality of the area is variable. Some streets such as St Thomas Street offer a good quality environment; Nicholas Street and Lower St Alban Street far less so. Arguably, although the Custom House Quay area offers the benefit of the waterside, much more could be done to enhance this area (this would be expected to complement the Western Harbour Area, which offers a very good environment). Such initiatives would relate to improving the streetscape, and allow greater opportunities for visitors and shoppers to enjoy the atmosphere of the working port, for example through the provision of street furniture and enhancement of other key public realm areas.

Great George Street/Westham Road

4.70 This area is rated as fair, and according to our survey receives the lowest environmental score in Weymouth town centre. The lower scoring in part reflects the poorer quality of shop fronts, carriageways and overall quality of the streetscape. While, typically, a lower environmental score is reflective of this secondary retailing area, any initiatives to improve the ambience of this area would be welcomed.

4.71 A particular initiative which could improve this area would be for it to forge better links with the marina to the north. Presently, the George Street area is separated form the marina by the busy Commercial Road and areas of surface car parking. Potentially, were these areas better linked this could increase activity/pedestrian flaws in the area and help enhance the perception of this zone.

The Esplanade/New Street/Maiden Street

4.72 The Esplanade forms the main street frontage to the sea. The buildings are of traditional character and form a strong building frontage over looking the sea and beach. The built form is well maintained and provides a mix of uses; while the majority are hotels, there are also shops selling beach goods and some restaurants and amusement arcades. The road widens at the southern end with street-side parking. The wide road separates the active sea front from the frontage of the buildings and as a result the activity along the front of the buildings is weaker than on the beach. The area is dominated by the road and the parking area and could be improved by greater priority being given to pedestrians.

4.73 The Weymouth Seafront Regeneration Design Guide which includes the Esplanade, has been produced to establish a strategy and design principles for the refurbishment of the promenade including the location and form of a series of new buildings and landscape structures intended to replace poor quality buildings, planters and uncoordinated street furniture along the promenade. The planned improvements to this area (as detailed in para. 4.17) are proposed to take place prior to 2012 Olympic Games and are expected to significantly enhance this area of the town.

4.74 Leading off the Esplanade are a series of narrow streets. This area is attractive and adds significant diversity to the town centre due to the mix of independent stores that occupy the area. There are however sections of the road and pavement which could be enhanced: New Street for example contains a mix of stores and the rear of the buildings presenting a rather fragmented streetscape. In places, pavements are narrow, albeit that this is a consequence of the historic nature of the centre.

4.75 Perhaps most importantly from our assessment of Weymouth's environment is a need to provide and enhance existing focal points in the centre. This includes those at New Bond Street Square, to the rear of the Marks & Spencer and along the Esplanade generally. Also, much greater effort should be placed on improving the pedestrian environment along the Quayside/Harbour and Marina. Every effort should be made to link these areas better with the core retail centre, so that they blend effortlessly together, which in turn will create a diverse and attractive destination for shoppers, visitors and workers alike.

4.76 Waterside improvements, such as those which have already occurred on the west bank of the quay would be welcome initiatives to spread more widely the offer at the waterside settings in the town centre. This could also be assisted through a greater provision of on street seating to generate a more relaxed atmosphere, where possible. One of Weymouth's key attractions is its mix of built environment with water/seafronts and the benefit of this should be maximised as much as possible.

Customer Views and Behaviour

4.77 In terms of the shopping and leisure patterns of visitors to Weymouth town centre, the household survey identified the following:

- For convenience goods Weymouth town centre achieved a low market share due to the number of large convenience stores located on the edge of centre.
- For comparison goods Weymouth was recognised as the most popular place to go within the study area.
- When asked which centre the residents usually visit most often the highest number (34%) stated Weymouth. As expected the highest number came from the nearby zones for example 80% of residents came from Zone 6 (Weymouth), 64% from Zone 8 (Portland) and 57% from Zone 4 (North Weymouth).
- Furthermore 30% stated they visited 2-3 times a week. The most popular reasons they visited the centre were because it is easy to get to from home, an attractive environment/nice place, and its provision of good non-food shops.
- The majority stated that there was very little they disliked about the centre however, some respondents felt that it would benefit from a greater range of shops and felt that car parking was too expensive. In addition a number of people stated that they disliked the number of tourists, drug addicts, homeless and drunks within the town.

- 43% of people within the catchment stated they visited Weymouth for a night out. This was the highest in the study area by far and compares with 14% who visit Dorchester and 11% who go to Bridport. It is also noted that 6.4% of the residents left the catchment to visit Yeovil for a night out.
- However in terms of the number of times they visited the centre in the evening the highest percentage (22%) stated that they visited less often than once a month. Popular evening attractions include Cineworld where 59% of the catchment residents visit. We believe it is reasonable to assume that during the peak tourist times, visitor numbers to entertainment facilities would be higher.

Perception of Safety and Crime

4.78 In the main, the streets of Weymouth town centre are covered by CCTV, and are well lit and generally appealing. Many of the surface car parks are also covered by CCTV, and again, are well lit. Arguably, however as there are few residential units in the town centre, the level of natural surveillance is reduced, especially in the evening.

4.79 The cinema, bowling alley and area around New Bond Street is an active area in the evening. As however these uses are primarily located in the western area of the town, some retail areas of the centre become much less active in the evening. Possibly, the narrow nature of the streets may make some areas less appealing, especially during the dark evenings (for example, New Street).

Out of Centre Retail Provision

4.80 In addition to the provision within Weymouth town centre, the largest supermarkets are provided on the edge of the town. These include an Asda which is located on Newstead Road, close to the town, an Aldi at the Jubilee Retail Park, and the Lidl and Morrison's on the Dorchester Road. All of the stores are defined as edge of centre sites within the Adopted Local Plan. Further information as to the trade draw these stores have to the town centre of Weymouth is given within Section 7.

4.81 In terms of retail warehousing, whilst Weymouth does not have a major out of town retail park. The Jubilee Retail Park performs this role to a certain extent and offers units occupied by Curry's, Powerhouse, Carpet Right and Matalan. In addition there are also fast food outlets such as KFC and Mcdonalds.

4.82 There are also are a number of small local shopping parades within the housing estates comprising small convenience stores. These include Easton Square, Portland Road, Wyke Regis, Littlemoor Centre, Fortuneswell, Abbotsbury Road, Westham, Lodmoor Hill and Southhill Centre. All of these stores perform an important role as a local focal point to the community.

Potential Capacity for Growth

4.83 Weymouth town centre does offer a number of potential retail development sites that could be pursued through regeneration initiatives, albeit that there are generally challenging and mostly of a long term nature. These include:

- Land at St Nicholas Street/John Street;
- Park Street car park; and
- Colwell shopping centres.

4.84 These and other possible development opportunities are discussed in detail in Section 9. In the main, opportunities to extend the retail offer in the town centre are constrained.

Summary

4.85 Overall, we consider that Weymouth town centre is a vital and vibrant centre. In particular, our health check identifies the following key points:-

- The comparison sector is very well received in the town centre, as would be expected. There is also a strong representation of service sector operators. By comparison the convenience offer is limited due to the existence of nearby out of town stores.
- Going forward, increases in the representation of quality fashion retailers and potentially improving the convenience offer would be expected to enhance and diversify the centre's offer. To achieve this may however require modern units of a suitably large scale – currently Weymouth's stock of such units is limited.
- There is fairly good demand from retailers to locate in Weymouth. Rents have also risen in recent years, while prime retail yields are currently keen. Generally, this points towards a healthy centre with good future economic prospects.
- The level of shop unit vacancies has reduced considerably in the past year and is below the national average. The lack of available units may however may constrain growth in the future.
- It is likely that the size of the retail units available may be detracting multiple occupiers locating in the town. In these circumstances, more radical intervention may be required through considering the redevelopment potential of some areas. Residential uses might help to facilitate mixed use development in more secondary areas.
- The range of proposals to Weymouth and Portland such as those to the Esplanade, Pavilion Theatre and transport improvements will further enhance the town's tourism and leisure potential beyond the 2012 Olympic Games.
- Weymouth has a fairly good evening economy, entertainment and cultural offer. Weymouth already benefits from a strong leisure provision with the cinema and bowling alley located within the town centre itself. The location

of both leisure and retail development in the centre of the town is considered particularly important in strengthening the town's role, but should be balanced against residential amenity issues.

- The environmental quality of the centre is fairly good in prime retail areas. However, in some places the quality of the streetscape diminishes, especially in more secondary areas. Overall, the general quality of the retail environment is an increasingly important factor to shoppers and retailers alike. High quality urban destinations can be a defining factor between competing centres. In that respect Weymouth should seek to maximise the benefit of its waterside settings to develop a more unique destination.

4.86 Whilst we consider that Weymouth is a healthy centre, there is the need for the centre to evolve and improve. In turn, this will ensure that in the future the centre can continue to compete effectively with other nearby shopping destinations. Whilst major new retailing development in the town centre is a challenging prospect, much more could be done to tie the built and waterside settings of Weymouth together. In turn, this could help strengthen Weymouth's reputation not only as a shopping destination, but also somewhere to combine this with more leisurely pursuits, thus creating a more individual centre.

Dorchester Town Centre

4.87 Dorchester is located broadly central to the District of West Dorset. It is located on a key transport interchange with routes to the north (Sherborne), east, (Poole & Bournemouth) south (Weymouth) and west (Bridport, Lyme Regis). Whilst the main High Street remains open to traffic, the A35 leads south around the town diverting some of the traffic out of the centre.

4.88 Dorchester is a market town with a strong historical heritage. Dorchester has developed as an administrative centre, and despite its relatively small urban population (16,500 – census 2001) it is an important shopping and service centre for the surrounding rural population.

4.89 Dorchester town centre is the primary shopping centre in the West Dorset District Council administrative area. The town centre forms a broad 't' shape, with the primary shopping area, as defined in the Adopted Local Plan (2006) running north and south along the pedestrian streets of Cornhill and South Street. The primary shopping designation also covers The Forum Centre to the west of South Street. At the top of Cornhill is High West Street and High East Street. This thoroughfare is dominated by service sector outlets, hotel uses, museums and the Council offices. As a whole, the town centre is fairly compact in nature, a characteristic which is generally known to underpin a more vibrant and healthy centre.

4.90 To the south of the town centre at Fairfield's there is a weekly market every Wednesday. This is a county market offering a full range of goods, from local farm produce to second hand items and antiques. There are a total of

500 pitches, 150 of which are in a covered space, which used to be the cattle market. Although streets around the market are busier on market days and 'linked trips' to the town centre are inevitable, its location does not maximise these benefits.

Diversity of Uses

4.91 The most recent Experian GOAD data for Dorchester is September 2006. The table over the page outlines a breakdown of the uses within Dorchester town centre (and described by the GOAD data), and compares them with the national average.

Diversity of Uses within Dorchester

Retail Category	No. of Units	% of Total	National Average %	Variance %
Convenience	18	2.8	9.0	-6.2
Comparison	142	49.0	45.5	3.4
Service	88	43.0	33.0	9.9
Vacant	11	4.2	10.9	-6.7
TOTAL	259			

Source: Experian GOAD September 2006.

4.92 The figures illustrate that at present there are a total of 259 retail trade and service outlets in Dorchester town centre. The data indicates that the percentage of convenience units is below the national average. Occupiers include Waitrose at the rear of the Tudor Arcade, Somerfield within the Forum Centre, and Iceland on Trinity Street. In addition, Marks & Spencer on South Street accommodates a sizeable food hall. The remainder of the convenience retail offer comprises small scale independent retailers. Overall however there is a reasonably good qualitative range of convenience stores on offer.

4.93 In contrast, the percentage of comparison units is above the national average. The main comparison anchors within Dorchester town centre include Marks & Spencer, and Gould's department store, which are both located on South Street. As with all centres seeking to meet longer term shopping requirements there is a continuing need to attract other comparison operators, in particular higher order luxury retailers, given that their presence often reflects a healthy centre. It should however be noted that Dorchester already has a fairly good representation of higher order retailers, given the moderate size of the centre.

4.94 Service uses account for approximately 43% of all the units within Dorchester town centre. This is slightly higher than the national average. In part, this reflects Dorchester's role as the district's key administration centre, and one which serves a wide rural hinterland. Whilst the service sector is an acknowledged growth area, the preponderance of service uses along High

West Street has however had the effect of making this area less vibrant in comparison to other parts of the town.

Retail and Services Provision in Dorchester Town Centre by Floorspace

Retail Category	Floor Space (sqm)	% of Total	National Average %	Variance %
Convenience	5,026	11.7	11.56	0.14
Comparison	23,523	55.2	54.09	1.11
Service	12,384	29.0	28.48	0.52
Vacant	1,663	3.9	3.82	0.08
TOTAL	42,596			

Source: Dorchester Experian GOAD Report 2006

4.95 When the retail mix is considered in terms of floorspace the figures show that although the convenience provision is below national average in terms of unit numbers, the sizes of the units combined creates figures marginally above national average. This indicates that food providers are generally in larger units in the centre. Conversely, comparison operators account for a slightly smaller proportion of floorspace, as compared with the unit analysis. This indicates that average shop units in Dorchester are smaller than the UK average for comparison operators. It may also highlight a need to provide larger units, if the centre is to meet retailing requirement trends. As expected, the proportion of service unit floorspace in the town is lower than when assessed on a unit basis, reflecting the general trend that these occupiers prefer smaller outlets.

4.96 Looking at retail sub categories in more detail identifies:

- **Groceries and frozen foods -** In terms of convenience offer, Dorchester town centre comprises three main foodstores, Waitrose, Somerfield, and Iceland. Waitrose (1028 sqm net) is located to the east of the Cornhill retail area and is accessed via Tudor Arcade as well as from Charles Street car park. The store retails primarily convenience goods. Somerfield (791 sqm net) is located within the Forum Parade, to the west of the key retail area and also principally offers convenience goods. The Iceland store (485 sqm net) is located on Trinity Street. The consumer choice here is much more limited with very little in terms of fresh grocery items. In addition the Marks & Spencer (approximately 84 sqm net) includes a convenience section. With the exception of the Iceland store, all these stores appear to be trading well. This suggests that whilst Dorchester offers a fairly good range of food provision, there could be scope to increase this offer. Moreover the household survey indicates that much of the trade is leaked to the edge of centre Tesco's.

- **Variety, department, fashion and catalogue stores –** Dorchester town centre is anchored by the retailers along Cornhill and South Street which include Marks & Spencer, and Woolworths. There is one independent department store Gould's located on South Street. The town centre is also home to several up-market clothes stores, for example Monsoon; Country Casuals; Laura Ashley and Jaeger as well as numerous high street shops, including Next; Dorothy Perkins, New Look and Peacocks. Arguably, Dorchester's retailing profile could be enhanced by attracting another major department or variety store to the centre. This would probably however require a scheme of sufficient mass to be attractive to such occupiers. Potentially, development at Charles Street car park might offer this opportunity (and of course, subject to demand).
- **Restaurants, cafes and fast food –** There are a number of bars, cafes and restaurants scattered throughout the town centre, with these principally located towards the edge of the town centre. Positively, Dorchester offers generally good quality of restaurants and bars, rather than a preponderance of fast food outlets, which is often the case in many centres. Were the centre to increase the representation of higher quality eateries this would serve to strengthen the centre further.

4.97 In terms of other town centre uses, Dorchester has a reasonable provision of entertainment and cultural facilities although this could be improved. Many of these uses are dispersed around the outskirts of the town. Within the town centre itself, there is a cinema (2 screens) and a bingo hall on Trinity Street, however both buildings are fairly dated and in need of refurbishment. There are also several public houses and restaurants along High West Street, close to two museums.

4.98 On the edge of the centre the Eldridge Pope brewery ceased production in July 2003. West Dorset District Council granted outline planning permission for the redevelopment of the brewery in December 2004. The site, to be known as Brewery Square, is planned to include new restaurants, bars, shops, a cinema, a replacement (and solar-powered) railway station building at Dorchester South and in excess of 600 new dwellings. The Maltings, one of the original 1880s buildings, is, subject to funding, to become Dorchester's arts centre. It would replace the existing and cramped premises on School Lane.

4.99 At the Thomas Hardye site, there are also plans for a redeveloped leisure centre including a new swimming pool, learner pool and gym.

4.100 From our site visit, there appears to be a good existing residential stock within the town centre itself. On the edge of the settlement is an urban extension known as Poundbury. This extension has been well publicised as the site is owned by the Duchy of Cornwall. The area is being developed over a period of 25 years and will eventually be composed of four phases with a total of 2,200 dwellings and a population of about 6,000. Poundbury will also now house a new headquarters for the Dorset Fire and Rescue Service as well as a new fire station to be completed by September 2008.

4.101 It was also noted that the pedestrian footpaths at the south of the town were in active use. Residential uses add significant vibrancy to the town centre, add to its diversity and increase footfall. Therefore, where opportunities arise to increase the amount of housing to the centre this should be welcomed, especially on upper floors.

4.102 The centre also has a good provision of office space. This adds to the diversity of the centre, and its strength as both a retailing and employment destination. Where possible, office uses could be located on upper floors to create more vibrant mixed use schemes, with such space likely to be geared toward smaller professional occupiers.

Retail Commitments

4.103 The main retail commitment within West Dorset is that of Brewery Square on the edge of the town. This site obtained outline planning permission in March 2006 and more recently the reserved matters application was approved in November 2007. The mixed use development has consent for 1,300 gross sqm of retail floorspace, which is to be split in to small units to be occupied by niche retailers. The development also includes provision for further A3 floor space to provide space for high end restaurants. This development is located out of the town and therefore has been considered for within the non central stores table of the capacity forecast (Appendix 6).

4.104 Plans are also progressing with proposals for the Charles Street Car Park development. The applicants have recently submitted a retail assessment which is being considered by the Council. As no precise floorspace figures have been identified this development has not be accounted for within the retail forecast (Appendix 6).

4.105 It is also relevant to note developers Thornfield Properties, have recently acquired the Tudor Arcade which operates as a link from the centre of the town Cornhill through to Waitrose and the Charles Street Car Park, providing further opportunities to integrate the Charles Street development within the town centre.

4.106 Since this study was originally completed consent has also been granted for a Sainsbury's Local on Bridport Road, between Dorchester town centre and Poundbury. This consent is not reflected in our assessment of capacity.

Retail Representation

4.107 The tenant mix within a town centre can give a good idea of its existing vitality and viability, for example a good range of multiple retailers creates diversity and choice for the consumer, reflects that the centre has been successful in attracting multiple retailers and is developing itself as a good comparison goods shopping destination for the surrounding population. To enable this, a shopping centre needs to provide the choice for consumers to dissuade them travelling elsewhere, i.e. to larger more diverse town centres.

4.108 In September 2006, of 30 identified key multiples, 15 were found within Dorchester. This figure is consistent with our 2007 centre survey and represents a fairly good representation of multiple retailers.

4.109 The table below identifies 'key' multiple retailers in Dorchester as defined by GOAD Experian.

Key Multiples Retailers defined by GOAD

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

Source: Experian GOAD 2006,

4.110 If Dorchester is to grow as a retail centre, then the ability to attract more key retailers is important. Presently, however, there are few (if any) available units of a sufficient size to be likely to be attractive to such occupiers. Therefore, attracting additional multiple retailers to Dorchester probably rests on creating suitable additional retailing space. The Charles Street proposals may go some way to meeting this requirement. We are also aware of the recent purchase by Thornfield Properties of the Tudor Arcade. This provides a strong link between Charles Street and Cornhill/South Street and if designed properly it could result in a viable shopping circuit.

4.111 The town also has a good provision of high order independent retailers which are commonly located within the smaller shopping parades of the centre. This provides diversity to a centre's overall offer, and helps add character and individuality to the town.

Retailer Requirements

4.112 There is a good level of demand registered from retailers who wish to locate in Dorchester town centre and this suggests a healthy town centre. According to Focus, a total of 50 retailers have expressed demand for retail, service and leisure units within the town. No convenience retailers are identified. However, it should be noted that major food store operators rarely post their requirements on national databases. The composition is given in the table below.

Retailers' Requirements for Dorchester (September 2006– Sept 2007)

Category	Requirements	Minimum Gross Sq ft (Sqm)	Maximum Gross Sq ft (Sqm)
Comparison	35	147,800 (3,733)	208,900 (19,410)
Convenience	-	-	-
Services	15	33,601 (3,122)	86,061 (7,996)
Total		181,401 (16,855)	233,861 (21,730)

Source: Pipnet/Focus 2007

4.113 The retailer requirements include a broad mix of occupiers - both service sector and comparison. Of particular interest is the request from the national department store Debenhams, as well as the up market ladies clothes brand Fenn Wright and Mason both of which are arguably the types of operators Dorchester should encourage in order to strengthen the offer.

4.114 Dorchester's retail demand ranking has also risen very considerably in recent years. In 2000, Dorchester was ranked as 207th (1=highest); by April 2007 it had risen to 139th. This indicates growing demand from retailers to locate in Dorchester, and that requirements are probably not being satisfied.

Prime Zone A Retail Rents £ per Sqm (Sq ft) – Dorchester and Competing Centres (2000-2006)

4.115 The table below describes the prime retail results achievable in Dorchester, and compares this to competing key centres.

Centre £sqm (£ft^2) Zone A	Jun 00	Jun 01	Jun 02	Jun 03	Jun 04	Jun 05	Jun 06
Poole	1,130 (105)	1,130 (105)	1,130 (105)	1,240 (115)	1,240 (115)	1,290 (120)	1,290 (120)
Weymouth	700 (65)	700 (65)	755 (70)	755 (70)	755 (70)	810 (75)	810 (75)
Bournemouth	1,615 (150)	1,615 (150)	1,720 (160)	1,720 (175)	1,990 (185)	1,990 (185)	2,045 (190)
Dorchester	645 (60)	6456 0(60)	645 (60)	700 (65)	755 (70)	810 (75)	810 (75)
Yeovil	755 (70)	755 (70)	755 (70)	755 (70)	860 (80)	915 (85)	970 (90)

Source: Figures for June each year taken from Focus Report 2007

4.116 Dorchester's prime retail rent in 2006 was at £75 per sq ft, Zone A. The rental rise seen in the town since 2000 is broadly consistent with the wider UK trend. In comparison to other competing centres, Dorchester achieves a comparable rent to Weymouth. Of note is that the centre achieves a lower rent value than Yeovil, suggesting that this centre may be competing strongly with Dorchester (and perhaps reflects the wider offer available in Yeovil).

Yields

4.117 The commercial yield on non-domestic property is an indication of the confidence of investors and the rental growth potential of a centre. However, it does require careful analysis and its limitations must be understood. In broad terms, the yield on a property investment represents a return (in the form of a rent) on capital to an investor. The greater prospect of future rental growth, the lower the initial yield which an investor will be prepared to accept. Conversely, a higher yield affects a lower expectation of the future rental growth prospects. Yields are therefore an indicator of expectations of rental growth and the general economic prospects for a retail centre.

4.118 The table below compares the prime shopping centre yields for Dorchester with other competing centres. The table identifies that Dorchester's prime retail yield has improved in recent years. This mirrors the trend across all competing centres.

Prime Retail Yields % (2001-2007)

	April 01	April 02	April 03	July 04	July 05	July 06	July 07
Poole	7.25	7.25	7.00	7.00	7.00	6.50	6.00
Weymouth	7.50	7.25	7.25	7.25	7.25	6.50	6.50
Bournemouth	5.50	5.75	5.50	5.50	5.50	5.50	5.00
Dorchester	6.25	6.25	7.00	7.00	7.00	6.50	6.50
Yeovil	7.50	7.50	7.00	7.00	6.75	5.50	5.00

Source: Valuation Office Market Report July 2007.

4.119 The retail yield applicable to Dorchester demonstrates that there is good investor confidence in the town. Equally – and as would be expected – larger centres command an even stronger retail yield (Bournemouth, Poole), reflecting that these centres are perceived to be potentially more attractive to the investment market. Overall however, the yield profile for Dorchester indicates that it is a healthy centre and this is reinforced by the recent purchase of the Tudor Arcade and demand for floorspace within the Brewery Site.

Vacancy Rates

4.120 According to our centre survey (October 2007) Dorchester had 12 vacant units, which accounted for 4.2% of total retail units in the town centre. This figure is slightly higher than at 2006, but is substantially below the national average figure of 10.9%.

4.121 In terms of location, the vacant units were generally scattered around the town. There were however three vacant units clustered together on High East Street. The units are predominantly small in size. Two conclusions can be drawn from this analysis. Firstly, smaller retail units do not seem to be meeting occupier requirements (a UK-wide phenomenon). Secondly, where there are clusters of vacancies this suggests poorer trading environments, such as High East Street. Therefore, policies to overcome these issues would be welcome. Even so, the low level of vacancies characterises a healthy centre, and one which has good levels of demand.

4.122 Perhaps more importantly, the low vacancy level indicates a constrained supply of retail stock in the centre. Inevitably, this will result in retailers unable to fulfil their requirement to locate in Dorchester. The major proposals for the Charles Street car parks would however be expected to increase supply and satisfy much of this retail demand, assuming the proposals are implemented.

Pedestrian Flows

4.123 The most recent pedestrian footfall survey was taken as part of the town centre health check in 2000. This recognised the highest recorded footfall was found within central South Street (opposite Goulds Fashion) and comparatively a lower number of people along Trinity Street.

4.124 These findings correlate with our views on pedestrian flows based on our site visit observations. We found Dorchester to be a relatively busy shopping centre, and noted that footfall was particularly high within the core along Cornhill and South Street. This is where the majority of the main multiple retailers are located. In addition the smaller units located within the Tudor Arcade and Antelope Walk appeared to also have good footfall perhaps due to the number of high end independent occupiers. On observation, Trinity Street, High East Street and High West Street have lower footfall levels. This pattern reflects the primacy of streets in Dorchester town centre, with Cornhill/South Street the prime retail pitch and other locations such as Trinity Street secondary in nature.

Accessibility

4.125 Dorchester town centre is well connected to the local and primary road network. The A35 runs east-west around the town centre, the A354 leads south to Weymouth and the A37 leads north to Yeovil. This makes Dorchester a fairly accessible location for those travelling by car.

4.126 The town centre also benefits from two rail stations Dorchester West and Dorchester South, albeit both stations are located to the south of the town centre (and approximately 400-500m walk). Dorchester south is served by Weymouth to London services while Dorchester West is served by Weymouth to Bristol services.

4.127 Dorchester is also easily accessible by bus. Services operate to and from Weymouth, Axminster, Wool, Yeovil, and Bridport. We also understand that National Express operate services from Weymouth via Dorchester to London Victoria. In terms of public transport accessibility to the town centre, bus stops can be found along High East Street and High West Street and Trinity Street, making the centre reasonably accessible to shoppers arriving by public transport.

4.128 In terms of car parking, there are a number of large surface car parks within the town centre. These include, two large car parks accessed via Charles Street to the east of South Street; and a further surface level car park off Trinity Street. The car parks are of a reasonable quality, and are primarily located at the southern end of the centre. Arguably, their location contributes to the weaker trading environment along High East Street and West as there is far less parking provision within the northern part of the town. It is acknowledged that the car park at Charles Street is proposed to be redeveloped although we understand that a similar provision will be re-provided as part of the proposals for the site.

4.129 Overall, Dorchester is a relatively accessible centre with good road, rail and bus connections. However, for Dorchester which serves a largely rural hinterland (poorly served by public transport), it should be recognised that car accessibility and particularly parking provision is important in making the centre attractive to shoppers.

State of the Town Centre Environment

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

4.131 The scoring system is conducted for individual zones in the centre and the aggregated results for Dorchester are set out below:

Dorchester Town Centre Environment

Criteria	Average Score
Condition of carriageway	3.0
Seats, planters, hanging baskets, water features, public art (paintwork, broken, uneven, parts missing, not working, badly sited, not present)	3.3
Public Facilities, telephones, bus stops/shelters	2.7
Incidence of graffiti, fly posting, vandalism	4.5
Market stalls and street traders	4.0
Barriers to movement	3.0
Cycle parking	2.7
Maintenance and repair of buildings, shop fronts and canopies	3.3
Personal security and police presence	3.7
Wheelchair access and facilities for the blind and partially sites	3.0
OVERALL SCORE	3.3

*Source: CB Richard Ellis On Street Environnemental Audit, Note *Only applicable to Cornhill/South Street*

4.132 On average Dorchester town centre has scored 3.3 for the environmental audit representing a fair to good quality. We consider that in general it presents a relatively good shopping environment, and strongly benefits from its attractive historical character. There are however considerable differences in the quality of the environment across the town. Separate audits were taken of Cornhill/ South Street; High East Street/ High West Street; and Trinity Street. These are described in more detail over the page.

Average Environmental Quality Rating by Area

Area	Average Rating
Cornhill/ South Street	3.9
High East Street/ High West Street	3.0
Trinity Street	2.8

4.133 Cornhill/South Street - The pedestrianised section known as Cornhill contains a number of attractive well maintained period buildings. Cornhill which leads south to South Street is an attractive pedestrian shopping street. It has wide walkways which are well maintained. Seats and litter bins are provided at regular intervals throughout. There is also some planting, and little evidence of graffiti or vandalism. CCTV is in operation and the centre is also patrolled by the police, ensuring a safe and crime free environment. Overall, this area is of a good environmental quality receiving a score of 3.9.

4.134 There are however a few areas which could benefit from improvement. Hardye Arcade, a small row of about 15 shops could for example be improved, especially as it provides a key pedestrian link from Charles Street Car Park to the retail core.

4.135 The High East Street/ High West Street – acts as a busy thoroughfare and is a barrier to pedestrian movement. However, well maintained pedestrian crossings are evident and railings along the side of the road provide added safety particularly given that the pavements are relatively narrow in places. The historic built form adds to the attractiveness of this area. Traffic which runs along High West Street and High East Street does however detract from this environment. This is reflected in the overall rating of fair.

4.136 Trinity Street- is a secondary retail street. Several of the shop units offer rear access from Trinity Street, Antelope Walk is also served off this street. The road is also open to traffic and provides servicing to the retail units, which arguably creates conflict of uses. The rear of buildings and their service yards are visible along the street creating a poor environmental quality compared with other parts of the town centre. In particular the fragmented nature of this street, plus poorer quality maintenance of shop fronts and limited public facilities/ street furniture result in a 'poor to fair' rating.

Customer Views and Behaviour

4.137 In terms of the shopping and leisure patterns of visitors to Dorchester town centre the household survey identified the following.

- When asked which centre the residents usually visit most often 30% of respondents identified Dorchester, which came second place with 34% stating Weymouth. The majority stated they visited the centre 2-3 times a week
- The most popular reasons they visited the centre were because it is easy to get to and from home, offered an attractive environment and was a nice place. It is also considered to offer good non-food shops. There was nothing or very little they disliked about the centre but the majority felt the range of shops could be improved and the car parking was too expensive
- In terms of the evening economy Dorchester is not known for its night time attractions. Only 14% of the respondents stated that they visited the town in the evening and visited less than once a month.

Perception of Safety and Crime

4.138 Within the core areas of the town there appears to be a good perception of safety. This is created by the wide streets and generally open character of the centre, and the presence of CCTV cameras throughout the town.

Dorchester Out of Centre Retail Provision

4.139 In addition to the convenience stores within the town centre of Dorchester, there is a retail park on the edge of town with a Tesco (2,400 net sqm net) together with retail warehouse units occupied by Curry's, Allied Carpets and Halfords.

4.140 There are a number of neighbourhood shops, including a convenience store at Poundbury.

4.141 Further information as to the trade draw these stores have to the town centre of Dorchester is given within Section 6 from the findings of the Household Survey.

Potential Capacity for Growth

4.142 Dorchester town centre does offer a number of potential retail development sites that could be pursued through regeneration initiatives. In broad terms, our centre survey suggests that those with most potential are:-

- Land at Charles Street; and
- Land at Trinity Street.

4.143 Charles Street offers the prime opportunity to extend Dorchester's retail offer and with the recent purchase of the Tudor Arcade the opportunity now exists to potentially create to a viable shopping circuit. These opportunities, and others, are discussed in detail at Section 9.

Summary

4.144 In general Dorchester is considered to have an attractive core shopping environment, while some secondary areas are less appealing these areas still remain well used and active.

- Dorchester is a vital and viable centre, characterised by a below average vacancy rate, a good representation of comparison retailers and good demand from operators to locate in the centre.
- Whilst Dorchester has a reasonable range of higher order retailers, any increase in this representation would be welcome. Likewise increasing the number of key multiple retail operators located in the town would serve to strengthen the centre. Achieving this may well require the development of larger, more suitably sized retail units to meet their requirements.
- The lower representation of convenience stores operators, suggests that there may be scope to increase the offer in this sector.
- Dorchester is a fairly accessible location, with car parking provision important to its effective functioning.
- Dorchester has a reasonable leisure offer, given the scale of the centre. Together with the public houses and restaurants, this provides the foundations for the town's evening economy.
- The environmental quality of Dorchester varies considerably. While South Street/Cornhill offers a good environment, more secondary locations are less appealing. Improvements to the public realm in these locations would be welcome.

4.145 Whilst Dorchester is a healthy centre, there continues to be scope for improvement. Arguably, the key improvement is the need to extend the town's retail offer (and especially by providing larger retail units). In that respect, the proposed development at Charles Street car park would be expected to significantly contribute towards that objective. Also, improvements to the public realm in secondary locations would help build upon Dorchester's reputation as an attractive retail centre.

Comparisons between Weymouth and Dorchester

4.146 The town centres of Weymouth and Dorchester overall benefit from their proximity to each other, an observation confirmed by the 2008 Roger Tym economic vision for the area. Whilst the centres may perform different roles in serving South Dorset in terms of administration, health, education and employment through ongoing retail development we believe the centres, whilst retaining their own individual characters provide, or have the potential to provide a similar retail experience.

4.147 In relation to the towns respective roles, Dorchester is a county town although it has a limited range of both cultural and community facilities (Roger Tym and Partners 2008). Weymouth by comparison has recovered from a difficult economic period and is seeking to upgrade its tourism role and diversify its local economy further developing its sub regional role.

4.148 Dorchester is the historic county town and its particular strength is in the size of the service sector, providing employment in local government and other public administrative, health and education. The town draws a significant proportion of its work force from the surrounding rural areas and from Weymouth, creating significant traffic flows between the two centres.

4.149 Weymouth by virtue of its coastal location benefits from the waterfront and the opportunity to develop its cultural and leisure offer.

4.150 The health checks have identified that both towns are attractive viable centres. Historically the two centres have performed complementary roles, but this situation is changing as a result of development being brought forward over the years.

4.151 It is noted that the VenueScore (2006) rank identifies Weymouth at a higher rank than Dorchester. This is not unexpected given the uplift gained in Weymouth as a result of the Bond Street development in 2001, which introduced several large floor plate units to the town now occupied by multiple retailers Debenhams, New Look and Monsoon. Dorchester now has an opportunity of broadening its retail provision at Charles Street. This offers great potential for the town to provide a larger provision of national multiples in attractive sized floor plates, which will increase the retail attractiveness of the centre to residents and those within the surrounding areas. As a result we would expect this to increase Dorchester's VenueScore ranking over the coming years.

4.152 While this is likely to occur, it is evident from our study's findings and results of the household survey that residents rarely visit and shop in Dorchester if they live in Weymouth and vice versa. This suggests that both centres operate in defined catchments and predominantly serve the local resident population.

4.153 If residents require a greater range of shopping goods they are more likely to go to the larger higher order centres such as Bournemouth and Poole, where there is a greater variety and higher order of provision.

4.154 In addition it is also noted that both towns benefit from their individual characteristics, Weymouth being a seaside town with a Jurassic Coastline and Dorchester being located inland as a historic rural centre surrounded by attractive countryside. As a result the towns are considered to naturally attract and serve different consumer markets. The plans that are in place such as the Pavilion Theatre, and Esplanade, Weymouth and redevelopment of Charles Street, and Brewery Square, Dorchester will only help to enhance both of the towns' growth, without adversely impacting upon each other.

4.155 While this is apparent, it is nevertheless recommended that Weymouth brings forward suitable sites to provide more large floor plate units within the town in order to satisfy the demands and attract more national multiples. These measures are considered necessary to enhance Weymouth's existing offer and to retain the existing market share of its local residents. The findings of this study suggest that by doing this Weymouth will not draw trade from Dorchester but from the out of centre stores and surrounding centres.

4.156 The next section provides details of the REASN Model and the approach adopted to forecast how much capacity both town centres have to satisfy the catchment.

5

BASIS OF THE RETAIL CAPACITY FORECASTS

CB RICHARD ELLIS

BASIS OF RETAIL CAPACITY FORECASTS

5.1 This study reviews the current retail attraction and performance of the town centres of Weymouth and Dorchester. An additional report "Supplementary Assessment of Other West Dorset Market Towns (2008) also considers the capacity within the centres of Bridport, Lyme Regis, Sherborne and Beaminster. We have also assessed the quantitative expenditure capacity available to support further floorspace in each centre. The study, therefore, includes the preparation of up to date forecasts of the additional retail floorspace, which will be supportable by increases in the population and expenditure of catchment area residents.

5.2 We describe below our REASN forecasting model before setting out our forecast of the additional retail floorspace, for the period up to 2026.

The CB Richard Ellis REASN Model

5.3 There are a number of alternative approaches to forecasting the level of additional shop floorspace supportable in any location, and the retail impact of proposed retail development. Some rely on the use of drive time isochrones in defined catchment areas, whilst others employ gravity models to forecast the retail attraction of centre; or by an assessment of overall market share of available expenditure.

5.4 All of the methods require an assessment of existing facilities in the area, and the level of expenditure available. Using this data, most then apply judgements to identify the existing trading pattern and the consequences (both positive and negative) of additional retail development.

5.5 The effectiveness of the various forecasting methods available varies considerably according to the approach and assumptions used. Conventional gravity models are based on the attractiveness of different centres, and therefore the extent and potential of their trade draw, purely on size and accessibility. In reality, other factors, including the type and quality of retailers, level of parking provision, and the retail environment. These can be equally important determinants of the trading pattern.

5.6 Forecasting methods on drive time isochrones to determine catchment areas also rely on assumptions and judgement rather than measures of the actual pattern of shopping visits from residential areas to shopping centres, foodstores and retail warehouses. Similarly, global market share based methods include a degree of interpretation because they rely on estimates derived from one location being applied to another with different catchment area characteristics. The result depends substantially on assumptions about the extent of the catchment area in each location.

5.7 In response to these CBRE has developed its Retail Expenditure, Allocation and Shop Floorspace Need (REASN) forecasting Model. The main difference between our approach and conventional gravity models is that the REASN Model employs the results of a household interview survey to identify the actual shopping patterns in the area and the extent of the existing catchment area.

5.8 Using the results of the household survey, it is possible to model realistically the existing flows of available expenditure to established town centres; as the basis for predicting the existing and future capacity for further retail development.

5.9 The REASN Model utilises the results of the household interview survey as its objective measured 'base line', using a step by step approach to:-

- Calculate the total amount of convenience and comparison goods expenditure which is available within the catchment area;
- Allocate available expenditure to the town centre, based on the results of the household interview surveys of shopping patterns. This is in order to obtain estimates of current sales and forecast future sales in the town centre;
- Compare the estimated sales with existing floorspace to determine the current trading performance of each shopping destination; and
- Assess the capacity for further retail growth within the catchment according to forecasts of expenditure and population increases.

5.10 The analysis distinguishes between convenience goods and comparison goods, defined as follows:

- Convenience goods: Food, alcoholic drinks, tobacco products, newspapers and periodicals.
- Comparison goods: Clothing and footwear; household textiles and soft furnishings; furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies, tools and garden products; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods and; non durable household goods.

5.11 The REASN Model is a very useful tool for retail planning, and may avoid assumptions about existing trade draw patterns and market shares which are often inherent in other forecasting methods. It has been used and refined in a large number of retail studies on behalf of public sector clients. In particular, forecasts made using the REASN Model have been accepted by Planning Inspectors and the Secretary of State at many Public Inquiries.

5.12 It is important to remember that the REASN Model is an exploratory tool, rather than a prescriptive mechanism. Thus, for example, in preparing forecasts for future shop floorspace capacity, the Model is usually run iteratively to explore the changes in the forecasting variables, such as in the pattern of attraction of expenditure or in sales densities, which would be necessary to support different levels of new development. Use of the Model in this way illuminates sensitivities and variables, and assists in the making of judgements about the realism of any given growth or impact scenario.

5.13 It is usually the case that substantial new retail development in any town centre has the potential to increase the market share of catchment area expenditure which is attracted to that destination. We expect this phenomenon to occur to some degree in both Weymouth and Dorchester, as a result of the new development planned within and on the edge of the two towns, such as the Pavilion Theatre Development in Weymouth and the Charles Street Shopping development in Dorchester. The modelling of this development was outside of our study brief.

5.14 For the purposes of this Retail Capacity Study, we have therefore adopted the respective town centre's existing market share as our 'baseline' position.

5.15 When using the REASN Model capacity forecasts as a guide to future planning policy, it is also important to remember that the further advanced the forecasting date, the less certain the forecast. Thus the forecasts for 2012 and 2017 are more robust than those for 2026. We suggest that the latter forecast only indicates the broad order of magnitude of retail capacity at that date, as it assumes the entire forecast trends continue. For this reason, we recommend that the forecasts should be reviewed and revised on a regular basis (for example every five years) in the light of events; taking account of the effects of any development which has occurred in the meantime.

5.16 As explained in Section 2, PPS 6 emphasises the need for local planning authorities, in consultation with stakeholders and other key local interests, to actively 'plan for the growth' of town centres through identifying need and gaps in provision by allocating sites to meet such need. Local planning authorities are charged with an overall need assessment over a plan period 'with regular updates'. Whilst developers are advised to identify need no further than five years ahead, paragraph 2.52 further states that in planning for growth in their town centres, local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their Development Plan Documents. Local planning authorities are also encouraged to ensure that suitable sites within or on the edge of centres are brought forward for development. In conclusion, PPS6 encourages Local planning authorities to plan for growth.

Principal Data Inputs

Catchment Area and Visitor Expenditure

5.17 CB Richard Ellis' National Survey of Local Shopping Patterns (NSLSP) 2007 comprises a countrywide sample survey of shopping habits for comparison goods which covers the whole country, and provides detailed information for each postcode sector on where residents shop most often for such goods. The results indicate the extent of the catchment area of all significant retail centres, and the market shares of catchment area comparison goods expenditure which are attracted to each centre from each postcode sector.

5.18 The NSLSP is a unique data source which is extremely useful for identifying the catchment area of a town centre for fashion based comparison goods, e.g. Clothing and footwear, jewellery, etc. It does not provide any information on shopping patterns for 'bulky' comparison goods shopping such as furniture and floor coverings, domestic appliances, hardware and DIY goods. In terms of this study it was therefore considered necessary to undertake a 'bespoke' household interview survey of the major part of the catchment area indicated by the NSLSP, in order to obtain more up-to date and more detailed information on shopping patterns for each of the various convenience and comparison goods sub-categories.

5.19 Based on the NSLSP data and the previous catchment area produced for the Donaldson's Retail Study for Weymouth in 2002, we defined a new survey area covering the Weymouth and Portland and West Dorset catchment area. This new survey area was divided into eight zones, each of which is a group of postcode districts/sectors which cover the following towns/areas:

- Zone 1 covers Bridport and Lyme Regis;
- Zone 2 covers Beaminster;
- Zone 3 covers central West Dorset;
- Zone 4 covers the area to the north of Weymouth;
- Zone 5 covers Dorchester town centre;
- Zone 6 covers Weymouth town centre;
- Zone 7 covers Sherborne; and
- Zone 8 covers Portland.

5.20 Using this new household interview survey area (described for modelling purposes as the catchment area), we designed and commissioned a new and detailed household interview survey of shopping patterns.

5.21 Interviewing and data processing took place in November 2007 through a random sample of 1,000 households, interviewed by telephone. The results of this survey are included in Appendix 5 and provide a detailed picture of where the residents of the catchment area shop for main food and top up convenience goods shopping, and for eight different categories of comparison goods shopping. They also provide some information on linked shopping trips, where the primary trip generator is main food shopping, and on travel mode.

5.22 To assess demand for leisure uses and the evening economy, there are a number of questions to identify the attraction of the cinemas, bowling alleys and health and fitness centres within the area, as well as questions in relation to the evening economy and the attraction of the towns during the evening.

Catchment Population

5.23 We have obtained a "Weymouth and Portland and West Dorset Area Profile Report" from MapInfo setting out the 2007 population of each of the eight catchment zones covered (see Appendix 4), together with trend based forecast populations for 2012, 2017 and 2026.

5.24 It is important to note that MapInfo's population forecasts are in the main based on past trends population growth. Whilst significant new housing growth is expected in both Weymouth and Dorchester and the catchment area over the forecasting period, our initial baseline assessment does not allow for this additional growth. Having discussed the expected population growth across the catchment area with officers at both Councils, we have sought to model a second scenario where by such growth is included. This means the forecasts in Table 1 may underestimate the growth in catchment area population over the forecasting period. For this reason Scenario 2 has been produced which updates the population in line with housing figures proposed by the Regional Spatial Strategy Panel Report (February 2008).

5.25 The base catchment area population forecasts (Scenario 1) by zone are set out in REASN Model Table 1 in Appendix 6.

Forecasting Dates

5.26 We have prepared base year estimates of retail sales at 2007. Our forecasts have been prepared for the years 2007, 2012, 2017 and 2026. As indicated above, the 2026 forecasts should be treated as a broad guide only, and reviewed and updated well before that date.

Price Base

5.27 All monetary values in this report are in 2005 prices, unless otherwise indicated.

Special Forms of Trading

5.28 Expenditure on Special Forms of Trading (SFT) is excluded from our capacity forecasts. SFT are mail order, vending machines and other non-store activity such as internet shopping. To take SFT into account we have made a deduction of 1.7% for convenience goods and 5.3% for comparison goods (as advised by MapInfo Expenditure Explanatory Volume: 2004 Expenditure).

Per Capita Expenditure

5.29 The MapInfo 'Weymouth and Portland and West Dorset Area Profile Report' indicates the average per capita expenditure on convenience and comparison goods in the catchment area as a whole at 2004. After deducting expenditure on SFT, these amount to £1,217 for convenience goods and £2,443 for comparison goods. These base figures are set out in REASN Model Table 2a in Appendix 6. The base figures for the year 2005 in Table 2a have been increased to allow for estimated actual growth over the period 2005 to 2006, followed by expected growth thereafter to 2026. For convenience goods, we have applied the estimated actual growth of 0.1% per annum (based on the ultra long-term) over the period 2005 to 2006; followed by the 1998 to 2006 (short-term) rate of 1.0% per annum, for the period 2006 to 2026. For comparison goods, we have applied the estimated actual growth of 5.5% over the period 2005 to 2006; followed by long term trend rate of 4.9% per annum to the period 2006 to 2026.

5.30 The combined effect of the forecast growth in population and in per capita expenditure is that we expect total catchment expenditure on convenience goods to increase by £75.1m over the period 2007 to 2026. We expect total catchment area expenditure on comparison goods to increase by £905m over the same period. This compares with forecast growth in total catchment area population of 15% over the period.

Tourist Expenditure

5.31 Weymouth and Portland and West Dorset are both acknowledged tourist destinations. Expenditure by tourists to convenience and comparison businesses provides a significant part of the GDP to the area. It is therefore important to account for expenditure when calculating the overall available expenditure within the catchment area.

5.32 There are however a number of factors which can affect tourist expenditure as follows. Expenditure by tourists is considered to be seasonal. Therefore, if floorspace is provided to accommodate expenditure by tourists, it will be underutilized during the off season period i.e. the winter months. Furthermore, tourist expenditure is also prone to fluctuation and there are a number of factors which could influence this. For example, if there is a wet summer, tourism to the beaches is likely to fall significantly, particularly from day trippers and casual visitors. If floorspace is provided to serve tourist expenditure and then tourist numbers decline, this could lead to an oversupply of retail floorspace which will be detrimental to retailing in the area.

5.33 In our opinion, because of its seasonal nature and unreliability, there are robust reasons why the Councils should be cautious for making provision for retail floorspace based on in flows of expenditure by tourists. However the implications for Weymouth and Dorchester Town Centres are slight. The greatest effect is more noticeable in the non central areas.

5.34 For this study, we have agreed to include expenditure by tourists on convenience and comparison goods within our analysis.

5.35 The most up to date information contained in the Weymouth Tourist Fact Sheet of 2004 does not specify the amount spent on convenience and comparison goods.

5.36 In order to identify the amount spent on these areas we have taken as a percentage, the split given by the Weymouth and Portland Tourism Fact Sheet of 2002 and the split identified in the visitor survey of 2005.

5.37 For Weymouth convenience goods represent 5% and comparison goods represent 20% of tourist spending (by tourists who stay in the area and those who visit for the day). Using most recent figures in 2004 a total of £1.2 million was estimated to be spent in the area, of this (5%) £62,848 was spent on convenience goods and £251,390 was spent on comparison goods.

5.38 Similarly for West Dorset, the 2005 visitor survey identified that 7.5% of tourist spending was spent on convenience goods, with 17% being spent on comparison goods.

5.39 According to the visitor survey there was an estimated £2.5 million spent in the area and of this (7.5%) £189,455 was spent on convenience goods and (17.5%) £429,430 was spent on comparison goods.

5.40 We consider this to be a robust approach reflecting the high proportion of convenience floorspace outside of the centres of Weymouth and Dorchester and allocates the available tourist expenditure accordingly. Turning to comparison goods expenditure, we anticipate that tourist expenditure to out of centre or retail warehouse floorspace will be insignificant, with almost all subject to existing town centre. Therefore, after applying a similar approach as employed to convenience tourist expenditure we have assumed that an additional 50% of the non central tourist expenditure is in fact spent in existing centres.

5.41 The Weymouth and Tourism Fact sheet of 2002, estimates that on average of £2.25 is spent on convenience goods and £8.25 is spent per day on comparison goods, from a total spend of £40.79 per day from both staying and day visitors. When applying these percentage ratios on the 2004 figures, the table identifies that £62,848 (5% of total tourism expenditure) spent on convenience goods and £251,390 (20% of total Tourism expenditure) is spent on comparison goods. This creates a total of £314,238 of expenditure being brought into Weymouth and Portland Borough (convenience and comparison goods).

5.42 Figures for West Dorset have been obtained from the Visitor Survey of West Dorset 2005, this estimates that there were 3.1m nights spent by staying visitors in 2005 spending an estimated £150 million. There are estimated to be an additional 3.3m people visiting the area for the day, who spend 102m. By using the same approach as that applied to the Weymouth figures, West Dorset 2005 data estimates that £13.48 is spent on convenience goods and £31.33 is spent on comparison goods. This represents 7.5% spent on convenience goods and 17.5% spent on comparison goods, creating a total of £189,455 spent on convenience goods and £429,430 spent on comparison goods, a total income to the area of £618,885. This identifies that tourists spend an additional £933,122 per year within the total catchment on comparison and convenience goods.

5.43 Tourists move freely between centres, and therefore in order to estimate their likely contribute to additional spending we have apportioned tourist expenditure between centres based upon the proportion of retail floorspace (both in and out of the town centre). Using this percentage as a basis for the amount of tourism expenditure spent within the town, the ratios were then multiplied by the tourist expenditure for convenience and then comparison goods. For example within Weymouth, the percentage of the towns floorspace (plus 50% of the out of centre comparison floorspace to account for tourists preference to spend in town centres rather than on DIY etc) was added and multiplied by the total spend on convenience goods in Weymouth and Portland.

5.44 As the future number of tourists is not known, we have not forecast changes in these figures over the plan period but a constant figure has been used throughout. This is consistent with the approach employed as part of the Donaldson's Study (2002) produced for Weymouth and Portland Borough Council.

Shopping Patterns in the Catchment Area

5.45 As indicated above, we have used the results of the commissioned household telephone survey as the key input to our REASN forecasting Model in order to forecast shopping patterns in the catchment area. Thus for the town centres of Weymouth and Dorchester, in Table 3a (i) we have combined the results of the question about 'main' food shopping with those of the question about 'top up' food goods shopping. This provides a weighted average market share of convenience goods expenditure, which is attracted by main foodstores from each zone by Weymouth or Dorchester town centre. Those stores falling beyond the town centre are considered as "Non Central Stores". This is dealt with in more detail later in this study. These weighted averages are then rounded to the nearest integer and used in Table 3a

(Appendix 6) to indicate the pattern of attraction of convenience goods expenditure by the main foodstores in Weymouth and similarly in Dorchester.

5.46 In the case of comparison goods, we have used the results of the household survey and have weighted the market shares for each according to per capita expenditure on each category. This provides a weighted average market share of all comparison goods expenditure which is attracted from each zone by Weymouth and similarly Dorchester town centre. The market shares for each individual goods category and the weighted averages are set out in Table 3a (ii); the final column (weighted average), of which is rounded to the nearest integer, and applied in Table 3a to indicate the market shares of all convenience and comparison goods expenditure attracted from each zone by Weymouth and Dorchester town centres. A similar approach is employed for comparison floorspace beyond the town centre, i.e. such as foodstores and retail parks including the Jubilee Retail Park in Weymouth.

Existing Shop Floorspace

5.47 Following the receipt of information from GOAD, we estimate there is a total of 1,531 sqm net of convenience floorspace in Weymouth town centre and 2,889 sqm net convenience floorspace within Dorchester in 2007.

5.48 The largest convenience store in Weymouth town centre is Tesco Metro (589 sqm net). The majority of convenience offer is provided in the out of town retail parks such as Morrison's (3,252 sqm net), Asda (2,485 sqm net), Lidl (836 sqm net) and Aldi (650 sqm net). With respect to Dorchester the largest convenience store is Waitrose (1,028sqm net), however there are others within the centre such as Somerfield (197 sqm net), Iceland (485 sqm net) and Marks and Spencer (84 sqm net). Again the largest store in floorspace terms is the Tesco (1,392 sqm net) located in the out of town Retail Park.

5.49 For comparison goods floorspace the GOAD reports on Weymouth and Dorchester identify a total of 22,423 sqm net within Weymouth and 18,818 sqm net of floorspace within Dorchester town centre.

5.50 The resulting floorspace figures are set out in Appendix 6, Tables 5a, and 5b (i).

Sales Densities

5.51 For the existing main foodstores in each town centre, we have applied estimated company average sales densities based on information published by Verdict Research. These are set out in Appendix 6 Tables 5a (ii).

Retail Productivity

5.52 Paragraph 2.34 of PPS6 identifies those factors that are likely to affect future demand for additional retail and leisure floorspace. This includes forecast improvements in productivity in the use of floorspace. This is also known as retail space productivity growth which means the increase of sales density (£ per sqm) over time. Sales densities can change over time for a variety of reasons, including:

- Retailers selling more goods from less space through; improvements in stock management; more efficient floor layouts; attracting more customers into shops and converting these visits into increases in sales;
- Longer opening hours; and
- Changes to the use of space in terms of the goods sold. E.g., selling smaller high value items can be more efficient than selling bulky high value items.

5.53 As new technologies emerge retailers become better and therefore more efficient at selling and this is reflected in increases in productivity over time. At present there are no official estimates of how retailer productivity growth might grow over time. We consider it appropriate to allow for comparison goods sales from existing retail floorspace to grow at 1.5% per annum in real terms. However, some practitioners are suggesting retail productivity growth may be as high as between 2 and 2.5% for some comparison goods.

5.54 In both Weymouth and Dorchester town centre many of the floor areas of existing retail units are already more productive than smaller retail units in other town and city centres. Indeed, higher productivity rates tend to be found in centres where floorspace is constrained and demand high. As both of the centres provide some modern shop units, we therefore consider that allowing sales from existing floorspace in both town centres to grow at 1.5% per annum in real terms is realistic.

Format of the REASN Model Tables

5.55 The detailed REASN Model tables are set out in Appendix 6. We have assessed <u>two scenarios</u> for retail development as follows:

1. Scenario 1 – the 'baseline' scenario, identifies the existing situation by accounting for the existing floorspace and applying market shares of available expenditure attracted from the catchment area through the period to 2026. The expenditure includes an estimated tourist income to the area.
2. Scenario 2 – applies the RSS Housing requirement planned for the area and from this identifies the population and expenditure increase, and applies the total expenditure (including tourism) to the same market shares.

5.56 For Scenario 1, Table 1 sets out the population forecasts for each of the eight catchment zones. Table 2a indicates per capita expenditure, growth in that expenditure, and total catchment area expenditure by zone for convenience and comparison goods over the period 2007 to 2026. Table 2b sets out the comparison good expenditure by goods categories.

5.57 For example for Weymouth Table 3a sets out the pattern of weighted average market shares of catchment area convenience and comparison goods expenditure which is attracted from the catchment area to the Weymouth town centre. This is based on the detailed results by goods category obtained from the commissioned survey (as described above), and set out in Tables 3a (i) for convenience goods and 3a (ii) for comparison goods. Table 4a is the product of Table 2a (catchment area expenditure) and Tables 3a.

5.58 Table 5a compares the expenditure attracted by the town centre and sales, with existing shop floorspace. It also indicates the resulting capacity for additional shop floorspace. The top line of Table 5a (spending by catchment area residents) is taken from the bottom line of Table 4a.

5.59 In the remainder of the assessment, tables numbered with the suffix:

- 'a' apply to Weymouth Town Centre;
- 'b' apply Dorchester Town Centre;
- 'c' apply to Bridport Town Centre;
- 'd' apply to Sherborne Town Centre;
- 'e' apply to Lyme Regis Town Centre
- 'f' apply to Beaminster Village Centre; and
- 'g' apply to non-central main foodstores and retail warehouses (detailed within Main report)

5.60 Tables 'c' to 'g' are considered in detail in the supplementary document.

5.61 For Scenario 2 the tables are rewritten to account for the additional population growth anticipated to the area over the planned period.

5.62 Table 1 of Scenario 2 identifies the population based on the proposed growth of 280 dwellings per year within Weymouth and Portland and an estimated 625 new dwellings within West Dorset. This results in an additional population of 2,000 people per year to the catchment based on the average density of 2.21 per dwelling (Dorset Databook 2007). At this stage these figures are not yet confirmed through the adoption of RSS. Work on the allocation of sites to accommodate the additional housing will take place in the future through the preparation of the LDFs.

5.63 The additional population is split across the catchment and applied as per the percentage ratio of each zone. The preceding tables for each of the centres recalculate this additional population using the same market shares as defined by the household survey.

5.64 At the request of the Councils we have also sought to identify the capacity that could be directed to Weymouth and Dorchester town centres (and the identified market towns) where the non central capacity directed to the town centres.

5.65 Section 6 assesses the catchment area of the town centres of Weymouth and Dorchester and their role relative to each other and surrounding competing centres.

6

STUDY CATCHMENT AREA

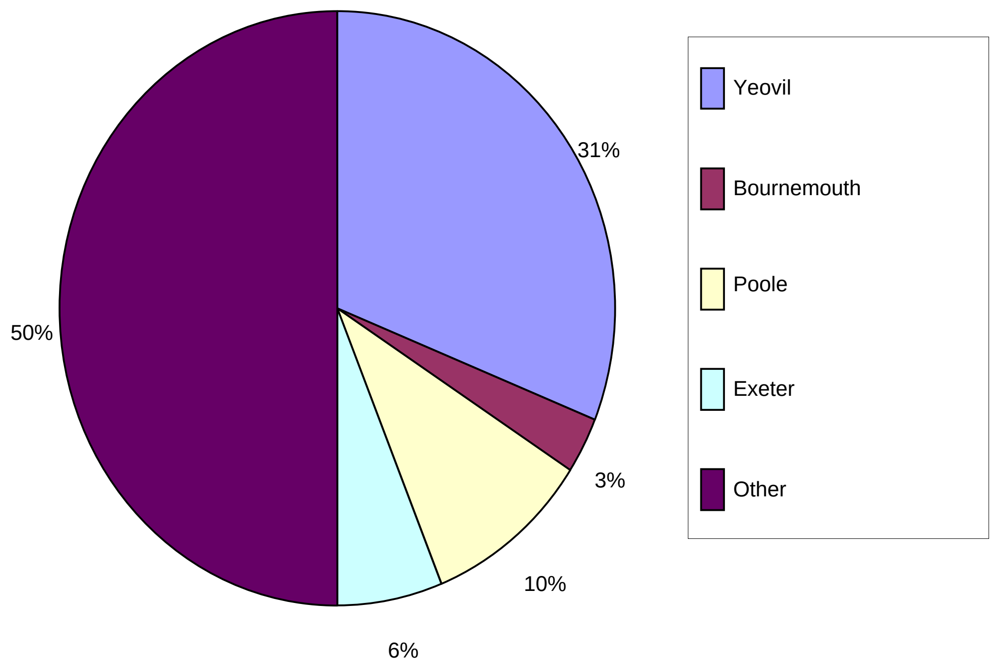
STUDY CATCHMENT AREA

6.1 To assess the catchment area of both Weymouth and Dorchester town centre and their role relative to competing centres, we have drawn on our up-to-date household interview survey. This examines shopping patterns in each of the town centres and the surrounding area.

Trade Draw Outside of the Catchment

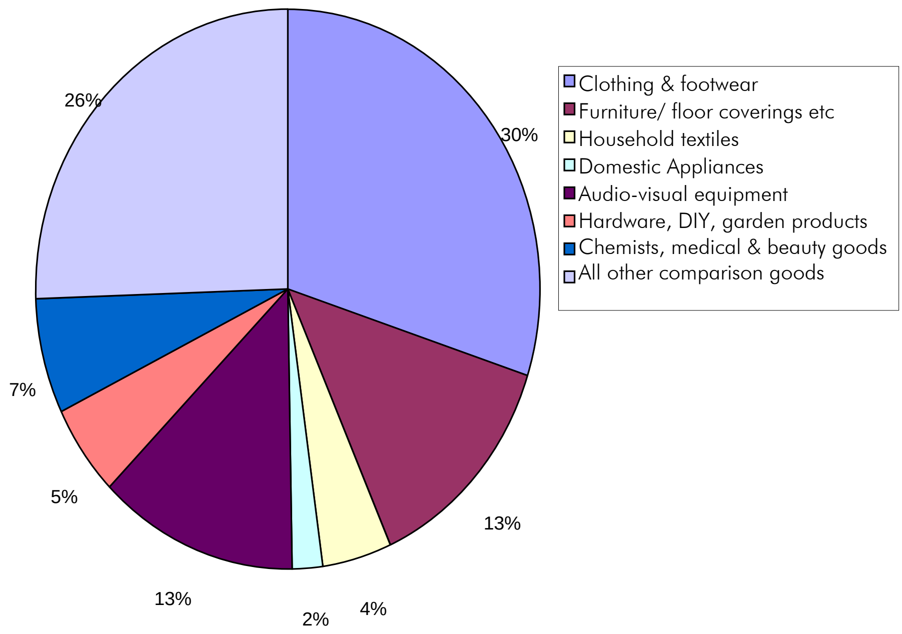
6.2 The findings of the household survey identified the main competing town drawing expenditure from the catchment was Yeovil, drawing 31% of the comparison goods market. Other centres include Bournemouth, Poole and Exeter, as shown in the pie chart below. However half (50%) of the catchment trade goes to 'other' stores out of the catchment area. This figure represents a diverse range of 'other' locations including London and Bristol.

Trade Draw of Comparison Goods Expenditure Leakage



6.3 With respect to what category of goods residents leave the catchment for, the highest number leave for fashion goods as shown below.

Total out of catchment spending



6.4 Both Yeovil and Bournemouth were identified as particularly attractive in terms of their provision of fashion goods. In terms of the other key towns, Poole was noted for furniture and floor coverings and Exeter was noted for its household textiles. The diversity in the range of goods that residents leave the catchment for indicates that residents on the whole seek a greater range or provision of higher order goods.

6.5 In terms of what the surrounding competing centres offer, below is a summary of the key retail characteristics of the main competitors to Weymouth and Dorchester.

Yeovil

6.6 Yeovil is located on the border of the North West boundary of the district of West Dorset, approximately 35 miles from Weymouth and 27 miles from Dorchester. Its primary catchment area encompasses the built up area including the smaller area of Preston, Yeovil Marsh, Mudford and Brimpton. The town is well represented in terms of key multiples such as Marks and Spencer's, BHS, Argos, HMV, Monsoon, Topshop and Miss Selfridges and there is a large number of speciality and up market retailers. In addition, there is an out of town retail park at Babylon Hill, on the edge of Yeovil. It is occupied by a large Next and Boots the Chemist along with accompanying smaller stores and given the range of typically 'town centre' uses provided on the park, it is responsible to assume that this will have a considerable draw on expenditure from Yeovil town centre.

Poole

6.7 Poole is located to the east of Weymouth and Dorchester approximately 35 miles form Weymouth. Poole is classed as sub regional centre and comprises three purpose built shopping centres; the largest is the Dolphin Centre which is occupied by a good number of multiple retailers. These include Boots, Primark, WHSmith, Woolworths, H Samuel, Dixons, New Look, Top Shop and HMV. The Poole conurbation is closely linked to the urban areas of Bournemouth.

Bournemouth

6.8 Bournemouth is a coastal town located 38 miles to the east of Weymouth. The town is classified as a regional centre and offers the largest retail provision within Dorset.

6.9 The main shopping streets in the centre of town are just behind the seafront. Most of the shopping streets are pedestrianised and lined with a wide range of boutiques, stores, jewellers and accessory shops. There are major stores (Beales, Dingles, Debenhams, Marks and Spencer, BHS), there are modern shopping malls, Victorian arcades and a large selection of bars, clubs and cafés.

6.10 North of the centre there is a new out-of-town shopping complex called Castlepoint with supermarkets, DIY stores and larger versions of high street shops. Other supermarkets are located in the town centre (ASDA and Co-Op), Boscombe (Sainsbury's) and between Westbourne and Upper Parkstone.

6.11 All of these competing centres seek to increase their attractiveness to shoppers by bringing forward new retail floorspace. A summary of new development coming forward is identified in the following table:

Proposed Major retail schemes in study Catchment Area

Town	Scheme	Size
Yeovil	Development brief for mixed use development at Market Place.	6,000 sqm additional gross floorspace
Poole	No current major retail commitments. Dolphin Centre owned by Grovesnor has the potential to be extended in the future.	
Bournemouth	Castle Point completed in 2005 located on the edge of Bournemouth – 40 stores and restaurants.	50,000 sqm gross retail (40 stores)

Source: Promis Data base 2007

6.12 The range and provision offered by the surrounding centres provides further evidence to suggest that Weymouth and Dorchester need to bring forward new retail and leisure development in order to retain their existing market share of their catchments.

Convenience Goods

6.13 In terms of convenience trade within Weymouth and Dorchester Town Centre, the household survey identified that the convenience stores within Weymouth town centre achieve a 10% market share. The majority (89%) of trade is drawn to the out of the centre stores such as the Asda (2,485 sqm net) at Newstead Road, Morrison's (3,252 sqm net) on the Dorchester Road, as well as the Lidl (836 sqm net) and Aldi (650 sqm net).

6.14 Based upon the results of the household survey, in Weymouth town centre, the highest trade draw for main food shopping is from Zones 6 (Weymouth) and Zone 8 (Portland), where the market share for both zones has been calculated at 5.5% and 7.2% respectively. The delineation of these zones is shown in Appendix 1, based upon the results of the household survey.

6.15 By comparison Dorchester town centre achieves a higher retention rate. The convenience stores within Dorchester town centre such as Waitrose, Marks and Spencer's, Somerfield and Iceland, achieve a market of 41%, however 56% of trade is drawn to stores out of the town, notably the large Tesco's at the Dorchester Retail Park to the south of the town. Again as would be expected the trade is drawn to the centres from the nearest catchment zones, for example residents visit the nearest supermarket to them, Dorchester's highest trade draw came from the zones close to the centre such as Zone 5 (Dorchester) and Zone 3 (Central West Dorset).

6.16 In terms of the draw between Weymouth and Dorchester, only 7.6% of residents in Zone 5 (Dorchester) visit Zone 6 (Weymouth). Similarly only 3% of residents in Zone 6 (Weymouth) visit the Supermarkets in Dorchester. This highlights that Weymouth and Dorchester although being located only 8 miles apart, operate within their own defined catchment.

6.17 In terms of the trade for 'top up food' items, it is a similar story. The supermarkets within Weymouth town centre attract the highest draw from Zone 6 (Weymouth) where 10.2% and Zone 8 (Portland) where 27.6% of the market are drawn. However, again the majority use the out of town stores, 51.3% of Zone 6 (Weymouth) residents and 12.9% of Zone 8 (Portland) residents visit the various out of town stores for top up items. This signifies the key role the out of town supermarkets play to Weymouth.

6.18 In terms of the top up food draw within Dorchester, the highest draw is from of Zone 5 (Dorchester) and 53.3% of Zone 3 (central west Dorset) residents go to the town for their top up food items This is compared with 36.8% and 25% respectively visiting stores outside of the town. However it must be noted that there are very few convenience providers out of Dorchester Town which is perhaps why this is the case.

Comparison goods

6.19 The term 'Comparison goods' covers a broad range of goods. In order to provide a clear indication of the trade draw for the various categories the household survey contained a total of 8 questions covering the following categories.

- Clothing and Footwear
- Household textiles and soft furnishings;
- Furniture and floor coverings;
- Household appliances;
- Audio visual equipment;
- Hardware, DIY goods, decorating supplies, tools and garden products;
- Chemist and medical goods, cosmetics and beauty products; and
- Books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.

6.20 The market share attracted by each category, drawn from the household survey is then applied to the total available expenditure, based upon the expenditure and population combined (Appendix 6, Table 3aii). The findings of comparison trade within Weymouth and Dorchester are given below.

6.21 Weymouth town centre attracts the highest trade draw for comparison goods, 83% of Zone 6 (Weymouth) residents visit Weymouth Town centre compared with 73% of Zone 5 (Dorchester) residents who visit Dorchester town centre. Weymouth's main shopping attraction is for cosmetics 79.2%, clothing and footwear 73.9% and books and stationery 72%.

6.22 Dorchester by comparison attracts residents for cosmetics, 95.6%, Books 87%, furniture and floor coverings 67% and Audio 64%. Clothes and footwear draws 60% of Zone 5 (Dorchester) residents spending.

6.23 In terms of the draw from Dorchester to Weymouth the catchments are fairly distinct with 8.8% of residents from Zone 5 (Dorchester) going to Weymouth for clothes and footwear compared with 5% of Zone 6 (Weymouth) residents going to Dorchester.

6.24 Of note is that the main category Zone 5 (Dorchester) residents visit Weymouth is for the DIY stores where 27% of trade is drawn, as well as furniture and floor coverings, where 21% of trade is drawn. Similarly the main category Zone 6 (Weymouth) residents go to Zone 5 (Dorchester) for is also furniture and floor coverings where 17% of trade is drawn. This is likely to be to the out of centre stores such as B&Q, and Carpet Right in the Jubilee Retail Park in Weymouth and Allied carpets at the out of the town store, Dorchester.

6.25 Question 5 asked where residents usually shop for clothes, footwear and other goods. When considering this sector in more detail, the household survey findings identified that 35% of the whole catchment visited Weymouth and similarly 35% of the residents visited locations outside of the catchment. For Dorchester 20% of residents in the catchment visited the town for their clothes and footwear. The table below identifies from which zones Weymouth shoppers originate.

Weymouth Town Centre Clothing and Footwear Market Shares

ZONE:	1	2	3	4	5	6	7	8
Town Centre 2007 (%)	9.7	4.5	8.1	51.0	8.8	73.9	2.0	84.5
Out of centre	0.7	0	1.6	2.6	2.5	4.4	0	0

Dorchester Town Centre Clothing and Footwear Market Shares

ZONE:	1	2	3	4	5	6	7	8
Town Centre 2007 (%)	17.9	20.5	53.2	29.0	60.0	5.0	4.6	6.9
Out of Centre	0	0	0	0	0	0	0	0

6.26 The tables show that Weymouth town centre draws its comparison goods trade from those Zones closest to the centre (Zones 6, 8 and 4). Similarly for Dorchester the highest trade drawn in from Zones 5, 4 and 3.

6.27 It is noted as shown by the table above for Dorchester, that the residents stated that they did not visit any comparison goods stores outside of the town centre for clothes. It is however acknowledged that the Tesco out of town may draw a small amount of comparison trade. A catchment area map including zones is set out in Appendix 1.

Summary

6.28 Based upon the household survey conducted in November 2007, Weymouth and Dorchester's main competitors for comparison goods are Yeovil, Poole and Bournemouth. Yeovil draws 17%, and19% of Weymouth and Dorchester trade respectively.

6.29 However both Weymouth and Dorchester attract good market shares (above 50%) from across the catchment area for comparison goods.

6.30 In terms of convenience goods it is evident that the supermarkets within Weymouth town centre suffer from competition from out of centre foodstores on the edge of Weymouth, as Weymouth town centre attracts very low market shares (below 10%). The household survey shows that the majority of residents within the zone go to these stores on the edge of the centre retaining trade within the area.

6.31 Dorchester town centre's convenience goods trade is higher than Weymouth with 40% of trade from Zone 5 (Dorchester) and achieving higher market shares from across the catchment area, particularly in those zones closest to the centre. However, we would expect a centre of its size to attract market shares above 70% from the zones covering its centre (i.e. zones 5 and 4) therefore it is evident that trade again is being drawn out of the town, most likely to the Tesco store on the edge of the town.

6.32 As shown in Table 5.1, other major centres (such as Yeovil, Poole and Bournemouth) close to Weymouth and Dorchester are bringing forward new retail development to improve their shopping offer and meet the demands of shoppers. It is important that both towns also bring forward new retail development to remain competitive with other town centres in the region and improve upon their draw from within their own catchment area.

6.33 The next section sets out our forecasts for capacity for new retail floorspace in the study area.

7

REASN MODEL FORECASTS

THE REASN MODEL FORECAST

7.1 We now set out our retail capacity forecasts for each of the town centres. This provides forecasts for both convenience and comparison goods.

7.2 We have assessed two scenarios for retail development as follows:

1. Scenario 1 – the 'baseline' scenario, identifies the existing situation by accounting for the existing floorspace and applying market shares of available expenditure attracted from the catchment area through the period to 2026. The expenditure includes an estimated tourist income to the area.
2. Scenario 2 – applies the RSS Housing requirement planned for the area and from this identifies the population and expenditure increase, and applies the total expenditure (including tourism) to the same market shares.

7.3 In assessing capacity for additional retail floorspace (both convenience and comparison) in Weymouth and Dorchester town centres, both Scenarios 1 and 2 are based upon the assumption that floorspace beyond the identified centres is excluded from the town centre calculation and treated as non central floorspace. This approach allows us to accurately predict the level of capacity that the existing town centres can sustain. The results of this assessment are set out in Appendices 6 and 7.

7.4 Due to the large amount of retail floorspace beyond the identified centres this approach results in low levels of convenience capacity and associated market share identified within Dorchester and Weymouth town centres and considerable capacity in the non central areas. In interpreting these figures it is important to remember that the existence of capacity beyond the town centres does not suggest that this capacity be directed to out of centre development. In accordance with PPS6 and the 'town centre first' principle this capacity should be directed towards existing centres in the first instance to enhance their vitality and viability and retail offer.

7.5 Whilst limited capacity exists in Dorchester and Weymouth town centres for convenience goods the existence of an improved convenience retail offer could be supported by reversing the current leakage of expenditure to existing out-of- centre foodstores.

7.6 To address this apparent under provision of convenience capacity we have sought to consider the wider urban area when assessing convenience capacity having regard to the provision of out-of-centre foodstores. In considering likely comparison capacity we have adjusted the non central allocation based upon Weymouth and Dorchester's current market shares. However it should be remembered that some of this non central capacity could be taken up by increased turnover of retail warehouse units and through the possible extension and reconfiguration of units over time.

Retail Sector Analysis

Weymouth- Scenario 1 – Existing Situation

7.7 A summary of the forecast capacity in Weymouth is given in the table below.

Table 7.1 Summary of Forecast Capacity for Additional Retail Floorspace in Weymouth

Goods/Location	2012 (Sqm net)	2017 (Sqm net)	2022 (Sqm net)	2026 (Sqm net)
Convenience Goods: Scenario 1: Weymouth town centre	(431)	(379)	(323)	(276)
Comparison Goods: Scenario 1: Weymouth town centre	3,854	9,806	17,069	23,309

Source: Reasn Model Forecasts (Appendix 6, Table 5a).

Convenience Goods

7.8 Table 5a in Appendix 6 shows that in 2007, the main foodstores in Weymouth town centre were achieving combined sales of £7.4m, at a combined average sales density of £4,855 per sqm net. Table 5a (i) shows that based on estimated company average densities, the combined sales density of the main food and convenience stores in Weymouth town centre (Tesco, Marks and Spencer, Iceland and the other convenience stores) in 2007 was £8,744 per sqm net. Therefore, these stores are estimated to be trading significantly below the expected level based on estimated company averages. This is likely to be due to the size of the convenience stores in the town centre and the number, size and variety of the stores located outside of the town, which as the household survey illustrates draws trade from the town centre. We consider this under-trading is due to the existence of such easily accessible out-of-centre food stores and the qualitative deficiency of food stores within the town centre.

7.9 Based upon a constant market share and assuming that the convenience floorspace sales densities remain unchanged, there is no capacity for additional convenience floorspace over the plan period. In practice, were a proposed food store to come forward within the town centre, we would expect it to 'claw back' expenditure currently leaking to existing out-of-centre stores, such as Asda and Morrison's on Newstead Road and Dorchester Road, respectively.

7.10 As indicated in the above table there will be no theoretical capacity for any new convenience floorspace even with assumed tourist income.

Comparison Goods

Scenario 1 – Existing Situation

7.11 In Appendix 6, Table 5a shows that Weymouth town centre is estimated to be achieving an average sales density for comparison goods in 2007 of £5,418 per sqm net. Based on our knowledge of a number of other town centres, we consider that this is a reasonable sales density considering the nature of the existing retail offer. There is no evidence of substantial under performance, but neither is the town centre as a whole trading at an exceedingly high level.

7.12 However, given the size of the town centre and its catchment, the absence of strong competition within the catchment area, the good public transport links into the centre and the level of parking provision, we consider that Weymouth has the potential to further increase its average sales density to accommodate the projected growth in expenditure shown in Table 2a Appendix 6 provided that the centre's market share of catchment area expenditure can be increased as a result of significant new retail development.

7.13 We further expect sales to grow in the existing shops in the centre. Therefore, we have allowed for comparison goods sales from the existing town centre floorspace to grow at 1.5% per annum in real terms. This will absorb some of the growth in expenditure.

7.14 The forecast shows that under the existing circumstances there is sufficient expenditure to support additional town centre floorspace. The retail capacity forecasts show that taking account of existing commitments (such as planning permission granted but not implemented) there will be sufficient expenditure to support additional comparison goods floorspace of approximately 3,854 sqm net by 2012, rising to 9,806 sqm net by 2017 and thereafter increasing to 17,069 sqm net by 2022 and 23,309 sqm net by 2026, if forecast trends occur.

7.15 This suggests there is already capacity to support additional comparison goods floorspace within the town centre without further increases in market shares created by any subsequent retail development. As highlighted in Sections 3 and 5, if Weymouth is to maintain its market share, the town centre will need to improve the shopping environment and retain existing retailers by 'clawing back' expenditure leaking outside of the catchment or by enhancing its existing retail offer.

Scenario 2 – Increase in population from RSS Housing Growth

7.16 A summary of the forecast capacity under Scenario 2 within Weymouth is given in the table below:

Table 7.2 Summary of forecast capacity allowing for RRS Housing Predictions

Goods/Location	2012 (Sqm net)	2017 (Sqm net)	2022 (Sqm net)	2026 (Sqm net)
Convenience Goods: Scenario 2: Weymouth town centre	(426)	(374)	(313)	(271)
Comparison Goods: Scenario 2: Weymouth town centre	4,065	10,055	17,363	23,639

Source: Reasn Model Forecasts (Appendix 7 Table 5a).

7.17 As a result of the increases in population and expenditure in the area, the forecast again fails to identify any additional capacity for convenience goods over the study period. This is on account of the low market share achieved by the town centre at present due to existing provision outside of the town. If a suitable convenience site was brought forward within the town, this would readdress the balance and 'claw back' expenditure spent in the out of centre stores. As such our conclusions highlighted under Scenario 1 still apply.

7.18 Floorspace capacity predicted following the additional population growth advocated by the RSS results in capacity for approximately 4,065 sqm by 2012, rising to 10,055 sqm net by 2017, 17,363 by 2017 and 23,639 by 2026 of comparison floorspace.

Dorchester- Scenario 1

7.19 A summary of the forecast capacity under Scenario 1 within Dorchester is given in the table below:

Table 7.4 Summary of forecast capacity for additional retail floorspace in Dorchester

Goods/Location	2012 (Sqm net)	2017 (Sqm net)	2022 (Sqm net)	2026 (Sqm net)
Convenience Goods: Scenario 1: Dorchester town centre	(142)	13	176	314
Comparison Goods: Scenario 1:Dorchester town centre	4,205	9,661	16,333	22,107

Source: Reasn Model Forecasts (Appendix 6 Table 5b)

Convenience Goods Shopping

7.20 For Dorchester Table 5b in Appendix 6 shows that the main foodstores in the Town Centre are estimated to be achieving sales of just over £19m in 2007. At this level, they are trading just below the level based on estimated company averages for each store (approximately £20.7m). If all the existing main foodstores were to have their sales densities increased to the estimated company average levels, no additional capacity is forecast until 2017 where only 13sqm net would be required. This would increase by to 176sqm net by 2022 and to 314sqm net by 2026.

Comparison Goods Shopping

7.21 Table 5b in Appendix 6 shows that Dorchester town centre is estimated to be achieving comparable goods sales of approximately £105m in 2007. This results in a base year sales density of £5,574m ^{2} net.

7.22 Overall, we conclude that the comparison goods shops in Dorchester town centre as a whole are trading moderately well, compared with other town centres of similar size and nature. There is no evidence of substantial under performance. Neither is the town centre as a whole trading at an excessively high level. We therefore consider that the estimated sales level in the town centre in 2007 represents a realistic 'equilibrium' position on which to base forecasts of future retail capacity.

7.23 Table 5b shows that based on the existing situation, there will be sufficient expenditure growth in the catchment area to support additional comparable goods retail floorspace of approximately 4,205sqm net by 2012, rising to 9,661sqm by 2017, 16,333sqm by 2022, and 22,107sqm by 2026 if forecast growth in per capita expenditure occurs.

Scenario 2 – Increase in population from RSS Housing Growth

7.24 A summary of the forecast capacity under Scenario 2 within Dorchester is given in the table below:

Table 7.5 Summary of forecast capacity for additional retail floorspace in Dorchester including RRS Housing Growth

Goods/Location	2012 (sqm net)	2017 (sqm net)	2022 (sqm net)	2026 (sqm net)
Convenience Goods: Scenario 2: Dorchester town centre	(122)	33	197	336
Comparison Goods: Scenario 2: Dorchester town centre	4,469	9,973	16,700	22,519

Source: Reasn Model Forecasts (Appendix 7 Table 5b)

7.25 Under Scenario 2 within Dorchester the increase in population and as such the increase in expenditure to the area will in turn increase the amount of retail capacity within the town. In terms of convenience goods the forecast is relatively small and is likely to only serve as an extension to an existing food store or small convenience store.

7.26 In terms of comparison goods the forecast identifies further capacity for comparison floorspace for approximately 4,469 sqm net by 2012m 9,973sqm net by 2017, 16,700 sqm net by 2022 and 22,519 sqm net by 2026.

7.27 Based on the existing provision, we therefore conclude there is no capacity for additional foodstore floorspace in Dorchester town centre for convenience goods within the plan period, as that identified could be accommodated by extensions to existing foodstores.

Non-Central Areas

7.28 A summary of the forecast capacity under Scenarios 1 and 2 in non central locations is set out in the tables below:

Table 7.6 Summary of forecast capacity for additional retail floorspace beyond existing centres

Goods/Location	2012 (Sqm net)	2017 (Sqm net)	2022 (Sqm net)	2026 (Sqm net)
Convenience Goods: Scenario 1: non central	2,395	3,401	4,474	5,380
Comparison Goods: Scenario 1: non central	3,974	11,383	20,406	28,140

Source: Reasn Model Forecasts (Appendix 6 Table 5g)

Table 7.7 Summary of forecast capacity for additional retail floorspace beyond existing centres including RSS Housing Growth

Goods/Location	2012 (Sqm net)	2017 (Sqm net)	2022 (Sqm net)	2026 (Sqm net)
Convenience Goods: Scenario 1: non central	2,512	3,523	4,601	5,512
Comparison Goods: Scenario 1: non central	4,382	11,865	20,974	28,778

Source: Reasn Model Forecasts (Appendix 7 Table 5g)

7.29 A considerable amount of floorspace exists beyond the identified town centres of Weymouth and Dorchester (and the identified smaller market towns). We estimate there to be in the region of 10,805 sqm net convenience floorspace and 19,661sqm net comparison floorspace (Table 5g, Appendix 6) in free standing stores and retail parks. To ensure that our assessment of capacity across the catchment is robust, regard must be had to this floorspace, its trade draw on the catchment area and also its likely level of turnover. It should also be noted that in terms of the levels of capacity identified within this 'non central area' such capacity should be directed to existing centres in the first instance. The identification of capacity in these areas in no way endorses additional floorspace beyond existing town centres. Where additional expenditure is identified which cannot be accommodated within existing town centres PPS6 is clear that local planning authorities should consider extending their town centre boundaries to accommodate this capacity and consider edge-of-centre locations. Only where this is not possible should consideration be given to out of centre retail locations.

7.30 Although significant capacity is identified beyond the existing town centres of Weymouth and Dorchester when the respective urban areas are considered and the aspirations of PPS6 to direct capacity to existing centres the actual levels of convenience capacity are significantly reduced.

Free Standing Food Stores

7.31 Under Scenario 1 (Table 5g in Appendix 6) we estimate the existing non-central main foodstores as a group (Table 5g (i)) are achieving combined sales in 2007 of approximately £142m. This is significantly higher than the level which they would achieve if they were all trading at their estimated company average level (£110m). Thus as a group, the existing non-central main foodstores in the catchment area are over trading. This reflects the under trading of foodstores within Weymouth and Dorchester town centres.

7.32 If all the non-central main foodstores in the catchment area have their sales densities reduced to an estimated company average level (£12,713 sqm), there would be sufficient expenditure released to support up to approximately 2,395sqm net at 2012, increasing to 3,401sqm net by 2017, 4,474 sqm net by 2022 and 5,380 sqm net by 2026, when accounting for commitments proposed in Weymouth and Portland such as the proposed Morrison's extension (843 sqm net).

7.33 Under Scenario 2 (Table 5g in Appendix 7) this capacity will increase to about 2,512sqm net additional convenience goods floorspace by 2012, rising to 3,523 sqm net by 2017, 4,601sqm net by 2022 and 5,512sqm net by 2026.

Comparison Floorspace including Retail Warehouses

7.34 There are several retail warehouses within the catchment area, these comprise both stand alone stores, as well as warehouses within the out-of-centre retail parks. It is estimated that in total there are thirteen stores providing a further 9,792 sqm net of floorspace within the catchment Appendix 6, Table 5g(ii).

7.35 Table 5g (ii) shows that these existing retail warehouses would achieve combined sales of £26.6m if they were all trading at their estimated company average levels.

7.36 In contrast, Table 5g (Appendix 6)shows that in 2007, these existing retail warehouses as a group are estimated to be achieving sales of £126m. Thus the existing occupied retail warehouses are significantly overtrading. If the existing and new retail warehouses are occupied and sales densities in all the retail warehouses are at estimated company average levels, under Scenario 1 by allowing for commitments proposed in Weymouth and Portland i.e. the proposed New Look extension (7,300 sqm gross) Wickes's extension (3,226sqm gross) there will be capacity from approximately 3,974sqm net by 2012, rising to 11,383 sqm net by 2017, 20,406 sqm net at 2022 and 28,140 sqm net (Table 5g Appendix 6).

7.37 Under Scenario 2 this capacity will further increase to approximately 4,382sqm net by 2012, rising to 11,865 sqm net by 2017, 20,974 sqm net at 2022 and 28,778, sqm net (Table 5g) when accounting for existing commitments.

Summary

7.38 In summary, based upon our assessment, the results of the household survey and scenario testing the following capacity exists to 2026.

Table 7.8 Scenario 1 - Capacity for additional Retail Floorspace at 2026

Centre	Convenience (sqm net)	Comparison (sqm net)
Weymouth	(276)	23,309
Dorchester	314	22,107
Non-Central	5,380	28,140

Source: Retail capacity tables Appendix

Table 7.9 Scenario 2 - Capacity for additional Retail Floorspace at 2026

Centre	Convenience (sqm net)	Comparison (sqm net)
Weymouth	(271)	23,639
Dorchester	336	22,519
Non-Central	5,512	28,778

Source: Retail capacity tables Appendix

7.39 The above table summarises the existing level of capacity assuming existing and forecast population through the RSS, company averages and using a constant market share. Using this approach we forecast there will be no additional capacity for new convenience floorspace within Weymouth and only limited capacity within Dorchester over the plan period. However as explained this is partly due to the existence of easily accessible foodstores beyond the town centres boundaries which draw trade from the centres. We consider it to be a realistic assumption that claw back from existing out of centre convenience store could take place if a suitable convenience store was provided within the town centres.

7.40 We conclude there will be capacity to support substantial new comparison goods retail development in both Weymouth and Dorchester town centre over the forecast period. However, it is acknowledged that both centres will need a 'step-change' in their retail offer including both quantitative and qualitative retail provision to attract increased market shares from across the catchment area.

Reallocation of non central capacity

7.41 In assessing the quantum of capacity available to support additional convenience and comparison floorspace within the study area, we begin by assessing capacity within existing centres. For the purposes of this exercise and the accompanying 'Supplementary Assessment of other West Dorset Market Towns (December 2008)', this includes: Weymouth; Dorchester; Bridport; Lyme Regis; Sherborne; and Beaminster.

7.42 The remaining capacity is captured by, what we refer to as, 'non central' areas which include those out-of-centre retail parks and food stores beyond existing town centres. An advantage of assessing need/capacity in this way is that it provides a useful indication of the trade draw of locations beyond the town centres and an indication of leakage of expenditure.

7.43 However, at the request of West Dorset District Council and Weymouth and Portland Borough Council we have sought to consider the increase in existing centre capacity based upon the redistribution of non-central capacity assuming existing market shares of those centres and the inclusion of foodstores within the wider hinterland of Weymouth and Dorchester town centres.

7.44 Below we consider the affects of this adjustment based upon Scenario 2.

Weymouth – Increase in population from RSS Housing Growth

7.45 If the wider Weymouth urban area is considered and the results of the household survey for visits to Weymouth town centre adjusted to allow for shopping trips to those freestanding foodstores beyond the town centre, capacity does exist for additional convenience floorspace within the town centre of between 739 sqm net in 2012 rising to 1,260 sqm net by 2017, 1,818 sqm net by 2022 and 2,283 sqm net by 2026. This appears realistic if regard is had to the resultant turnover of the foodstores based upon the household survey when compared to a notional benchmark turnover. When visited the out of centre foodstores all appeared to be trading well and based upon our assessment were trading in excess of company averages. If this is allowed for in our assessment of the wider Weymouth area the sales from existing floorspace i.e. expenditure spent on convenience goods increases from £7.4m to just over £77.1m in 2007. It is this increased expenditure which after applying notional sales per sqm turnover results in the additional floorspace for Weymouth town centre over the plan period.

7.46 These figures could potentially be higher as a new foodstore in the town centre could reverse leakage to the Asda at Newstead Road and Morrisons on Dorchester Road which in PPS6 terms are out of centre and afforded no protection in relation to impact/ trade diversion.

7.47 In considering how expenditure patterns may change over time we are also aware of proposals for a new Tesco at Bottomcoombe just outside Weymouth. Although not a commitment, if granted consent it could assist in meeting the needs of residents in and around Portland. Its impact upon Portland and surrounding areas would need to be assessed and satisfy the key requirements of PPS6. If granted consent it could absorb the capacity identified over the short term assuming no allowance for claw-back to Weymouth town centre

7.48 Based upon our capacity assessment and the results of the household survey, Weymouth town centre currently has a market share of just 25% for comparison goods. Whilst we believe it is realistic to assume that this could increase if new development comes forward it is not part of this Study's remit to consider this in detail

7.49 However, if the centre's current market share is applied to the non central floorspace the increase levels of capacity are illustrated in the table below:

Table 7.10 Summary of total available capacity allowing for reallocation of non central floorspace

Goods/Location	2012 (Sqm net)	2017 (Sqm net)	2022 (Sqm net)	2026 (Sqm net)
Convenience Goods: Scenario 2: Weymouth urban area	739	1,260	1,818	2,288
Comparison Goods: Scenario 2: Weymouth urban area	4,949	12,772	23,312	30,503

Dorchester – Increase in population from RSS Housing Growth

7.50 By taking a similar approach to that employed with Weymouth and considering the wider urban area expenditure on convenience goods increases from £19.1m to £44.5 at 2007. This results in capacity at 2012 of 410 sqm net, 722 sqm net by 2017 rising to 1,155 sqm net by 2022 and 1,479sqm net by 2026.

7.51 As with Weymouth this does not allow for claw back of expenditure from such out of centre stores as Tesco on the nearby retail park.

7.52 Based upon our capacity assessment and the results of the household survey, Dorchester town centre currently has a market share of just 22% for comparison goods. Whilst we believe it is realistic to assume that this could increase if new development comes forward it is not part of this Study's remit to consider this in detail.

7.53 However, if the centres' current market share is applied to the non central floorspace the increase levels of capacity are illustrated in the table below:

Table 7.11 Summary of total available capacity allowing for reallocation of non central floorspace

Goods/Location	2012 (Sqm net)	2017 (Sqm net)	2022 (Sqm net)	2026 (Sqm net)
Convenience Goods: Scenario 2: Dorchester urban area	410	722	1,155	1,479
Comparison Goods: Scenario 2: Dorchester urban area	5,433	12,383	21,314	28,850

7.54 As with Weymouth these figures should be treated as a broad indication of the likely levels of capacity available to the town centre. Whilst local planning authorities should plan positively and assess the need for additional floorspace over the plan period, in planning for growth they should only look to allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan.

7.55 Whilst the above figures identify the level of capacity based upon a constant market share we acknowledge that we have not sought to model the possible effects upon Dorchester's market share following the redevelopment of the Charles Street scheme.

7.56 It is recommended that such an exercise be carried out once the proposals have been finalised in order to provide a preliminary indication of the uplift in the town centres market share, were such a proposal to be granted planning permission.

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

7.58 All of the forecasts should be periodically revised as necessary in the light of actual population and expenditure growth, and the proposed new retail development in either town centre is completed and its effects become measurable. This would also enable the effects of any significant new developments in or improvements to competing retail destinations within the catchment area to be taken into account, when planning for further development.

7.59 The next section forecasts the areas capacity for 'other' town centre uses having regard to PPS6 definition.

8

NEED FOR ADDITIONAL OTHER TOWN CENTRE USES

NEED FOR ADDTITIONAL OTHER TOWN CENTRE USES

8.1 In addition to providing an assessment of retail capacity in the study area, we have also sought to identify the need for other town centre uses. In this regard, PPS6 (paragraph 1.8) lists the main town centre uses (excluding retail) as follows;

- Leisure entertainment facilities;
- Intensive sport and recreation uses;
- Cinemas;
- Restaurants;
- Drive through restaurants;
- Bars and pubs;
- Nightclubs;
- Casinos;
- Health and fitness centres;
- Indoor bowling;
- Bingo halls;
- Offices (both commercial and those of public bodies);
- Arts, culture and tourism (theatres, museums, galleries and concert halls; and
- Hotels and conference facilities

8.2 Unlike assessing retail need, which has been rigorously tested at inquiry, the approach to assessing leisure capacity is less developed. Examination of a number of appeal decisions throughout the UK identified that the need for leisure development has usually been demonstrated using more simplistic approaches which are based on deficiencies and provision or the quality of existing provision. A popular indicator of future need relates to potential gaps in the market or the identification of excessive leakages to other facilities elsewhere.

8.3 Our assessment of capacity in the leisure market is set out in Tables 1-7 at Appendix 8. Whilst the methodology and data sources applied to the calculation of capacity in the retail market are well established, this is not the case with regard to assessments of the leisure market. To provide a broad estimate we have focused specifically on the areas that the household survey provided data on, namely Cinemas, and Health and Fitness Centres, bingo halls, bowling alleys and restaurants, bars and clubs although, as stated above, the data sources are not as robust and detailed and therefore the results should be considered with caution.

Cinema

8.4 Table 1 of Appendix 8 identifies the number of cinemas within the catchment area. The total number of screens in the UK is calculated from research undertaken by Dodona and applied to the population figures set out Table 5 (Appendix 8) to arrive at the required number of cinema screens in the study area across the study period.

8.5 There are three cinemas within the catchment, these are located in Weymouth, Dorchester and Bridport. These comprise a total of 12 screens. Based on an average participation rate within the United Kingdom of 2.9 visits per person (as identified by Mintel – the UK Cinema Market Report, 2000), our assessment indicates that there are 522,319 cinema visits made in the catchment area. The household survey identifies that the current existing facilities in the catchment achieve a market share of 73%.

8.6 The most popular cinema is located within Weymouth town centre. Indeed, the Cineworld Weymouth is the largest within the catchment, containing 9 screens. Accordingly of those residents in the catchment who visit the cinema, 59% go to the Cineworld in Weymouth followed by 16% who go to the Cineworld at Yeovil, (located outside of the catchment zone), 12% go to Plaza 1&2, Trinity Street, in Dorchester and 1.8% visit the Electric Palace Cinema, Bridport. Furthermore the household survey identified that within Weymouth (Zone 6) approximately 21% of respondents visit Weymouth for the Cinema which is the highest of all survey zones within the catchment.

8.7 Statistics identified by Dodona (Cinema Going in Europe 2005) suggest some 50,900 visits per year per screen are required to achieve the average trading position of cinemas. Accordingly, the number of visitors per year required to support the cinema at Weymouth Cineworld would be 458,100. However this means that there is presently a shortfall of 354,869 visits per year and therefore no need for additional provision in Weymouth.

8.8 Similarly when you consider Dorchester the Plaza 1 and 2 in the town centre, which has 2 screens, by the same ratio attracts 49,935 residents from Zone 5 (Dorchester). The number of visitors per year required to support the cinema is 101,800 resulting in a shortfall of 51,865 visits per year. A further cinema is now also permitted as part of the Weymouth Avenue Brewery development.

8.9 Similarly in terms of figures for the total catchments, (which contains 12 screens) there needs to be an estimated 610,800 users to sustain the existing provision. As a result it is concluded that in line with the national average there is satisfactory existing provision of cinemas within the catchment, in fact as such there is an over provision of two screens which does not create need any additional screens over the plan period.

8.10 While these findings are noted, it is likely that the number of people visiting the cinema over the plan period will increase due to peak periods of tourists, trade from out of the catchment and increases to population from additional housing growth. With this in mind it is accepted that there may be some capacity for further provision or the refurbishment of the existing stock over the plan period.

Health and Fitness Centres

8.11 Whilst there was a boom in the provision of Health and Fitness Centre in the late 1990s the recent focus on obesity rates and healthy living issues has regenerated interest in the market, which is increasingly offering a more holistic approach to health and fitness.

8.12 Within the catchment area, the household survey results identify that only 12% of respondents stated that they regularly visited a Health and Fitness Centre. The majority go to facilities within Weymouth (Zone 6) which attract 33% of respondents and 18% of respondents go to those within Dorchester (Zone 5). The remaining business is directed to facilities in Bridport 14% and a number of smaller rural centres across the catchment.

8.13 At present the catchment contains a large number and good variety of private and publicly run health and fitness clubs. Table 2 of the leisure assessment in Appendix 8 uses the population figures for the catchment and makes an assessment of the penetration of Health and Fitness Club usage amongst the catchment population in line with the UK average.

8.14 This study confirms that the area is well served by Health and Fitness Centres, particularly in respect of private sector provision. There were a total of 30 private and public Health and Fitness Centres identified across the catchment by the household survey, 16 of these are considered to be public facilities and 14 of them are privately owned. These include Future Physiques in Weymouth, Curves, Poundbury West Industrial Estate, Dorchester and Herrison Health Club and Spa Ltd, Dorchester.

8.15 As a result our findings estimate that in line with UK average figures for Health and Fitness centres there an adequate provision to meet the needs of the existing catchment residents. Nevertheless it is important to emphasise that the figures quoted in our tables of additional clubs that may be supported are indicative only and should not be regarded as precise. The use of the Health and Fitness Centres is also likely to increase at peak tourist periods from the addition population as well as following planned housing growth.

Hotels

8.16 Weymouth already has a good provision of hotels, reflecting the tourism demand to stay in the centre. Generally, these are aimed at the mid market, but there is accommodation available to suit all budgets. A large majority of these hotels are located along The Esplanade. These are mostly independently owned and typically offer more traditional, rather than modern accommodation.

8.17 We are aware of good interest from hoteliers to locate in Weymouth, and understand that demand is mostly from budget or more luxury orientated operators (for example, a 4 star hotel is anticipated to be part of the pavilion proposals). These sub sectors are the most active in hotel development at present. There is however no mainstream budget hotels in or on the edge of Weymouth town centre. The nearest – a Premier Travel Inn – is at Lodmoor, several kilometres north of the centre. Budget hotels often seek out of centre locations close to major roads or where there is strong demand from businesses (i.e. close to large office developments). They also favour major town centre locations, such as Weymouth, if suitable sites can be found. Potentially, hotels can be stacked above ground floor uses in urban areas. In the case of Weymouth, attracting modern hotel operators to the town would be welcome, and would assist in upgrading the quality of accommodation available. The forthcoming Olympics 2012 sailing events are likely to enhance Weymouth's reputation as a tourism destination and therefore increase demand for rooms.

8.18 Dorchester has a more limited hotel offer, albeit that a cluster is located on the High Street East and West. Most cater for the mid market. There are no new hotel developments in or adjacent to the town centre, although the redevelopment of Eldridge Pope Brewery will, we understand, accommodate a boutique hotel. As with Weymouth, the existing hotel stock is generally of a more traditional nature, with no budget or luxury operators present. The historic nature of the centre, together with its administrative/ office sector may well be sufficiently attractive to hotel operators to locate in Dorchester town centre. The reputation of the centre will also be enhanced if the retail offer at Dorchester is extended through developing out the Charles Street car parks (other locations may also be suitable). Conceivably, the scheme itself may be able to accommodate a hotel, located on upper floors. This would serve to improve the quality of accommodation in the town centre, whilst adding to the diversity of Dorchester.

Ten Pin Bowling

8.19 There is one tenpin bowling alley within the catchment area and this is located within Weymouth town centre. Based on UK average numbers of tenpin bowling alleys, the study suggests that there is no additional capacity for tenpin bowling centres within the catchment area, as identified in table 6 of Appendix 8.

8.20 The market is however expected to grow, therefore in order to enhance profits, tenpin bowling providers will need to offer new locations and designs and encourage both young and old to take up the sport. A 'Hollywood Bowl' unit sizes average between 2600 sqm and 3250 sqm but can require more floorspace if ancillary uses are provided.

Bingo Halls

8.21 There are two Bingo Halls within the catchment area. A Gala Bingo Hall on the edge of Weymouth town centre and an independent operator within the centre of Dorchester on Trinity Street.

8.22 The bingo trends given in section 3 identified significant changes within the industry as it faces the threat posed by the smoking ban and the changes to the gambling laws in the Gambling Act 2005. It is estimated that nearly half of regular bingo players are smokers, compared with a quarter of the UK population overall

8.23 With this in mind it is unlikely that there will be further investment and development of Bingo Halls within the catchment in the current market climate. This emphasises the need to protect the existing provision in Weymouth and Dorchester as an alternative leisure facility.

'Night-Out'

8.24 In terms of theatres, pubs and clubs it is considered difficult to assess capacity for these uses. The household survey identifies Weymouth as the most popular place for a night out achieving 43% of trade draw. By comparison Dorchester achieves 14.3% of the market share and Yeovil 6.4%

8.25 The retail capacity projections given in Appendix 6 forecast convenience and comparison floorspace needs, which is the main focus of the study. However, in parallel it is acknowledged that there will be significant growth in expenditure on eating and drinking, and other leisure pastimes.

8.26 It is difficult to quantify the requirements for additional A3/A4 uses however given the existing and identified expenditure and the attraction of tourist expenditure, there is, in our opinion, capacity for additional floorspace within both town centres. This should however be caveated that such additional floorspace should be considered against existing and emerging planning policy and ensure that such uses do not come forward at the expense of existing active retail frontages.

Summary

8.27 From the evidence given by the household survey it would appear there is a good provision of key commercial leisure facilities within the study area.

8.28 While growth in demand for leisure facilities within the period is anticipated, the existing provision of cinemas, ten pin bowing, bingo halls and health and fitness centres is adequate to meet current and projected requirements until 2026 based on UK averages

8.29 As previously noted it is difficult to accurately forecast the need for increasing the 'evening economy' or cultural facilities. Nevertheless there is undoubtedly scope to improve the evening economy of both Weymouth and Dorchester provided this does not harm the vitality and viability of the centre and its retail function

8.30 Weymouth was identified as providing greater provision in terms of leisure notably due to its large screen cinema, and ten pin bowling and bingo hall located in the heart of the town centre

8.31 Dorchester by comparison offers small scale facilities serving a niche market could diversify its provision of restaurants and bars

8.32 Based on the identification of capacity over the plan period, the next section sets out the sequential approach to site selection.

9

SEQUENTIAL SITE ASSESSMENT

CBRE
CB RICHARD ELLIS

SEQUENTIAL SITE ASSESSMENT

9.1 PPS6 states that if there is no need for further retail development, there will be no need to identify additional sites for this purpose in the development plan. Whether or not there is a need for further retail floorspace in Weymouth and Portland and West Dorset and the catchment area is therefore an important issue for the new LDF of both Councils. In the event of need being established it will be necessary to identify sites to accommodate it in the revised plans.

9.2 Our assessment of need was considered in Section 7 where two scenarios were tested before considering the appropriate reallocation of capacity identified beyond existing centres.

Table 9.1 Summary of forecast capacity allowing for RRS Housing Predictions in Weymouth

Goods/Location	2012 (Sqm net)	2017 (Sqm net)	2022 (Sqm net)	2026 (Sqm net)
Convenience Goods: Scenario 2: Weymouth town centre	(426)	(374)	(313)	(271)
Comparison Goods: Scenario 2: Weymouth town centre	4,065	10,055	17,363	23,639

Source: Reasn Model Forecasts (Appendix 7 and Table 7.2).

Table 9.2 Summary of forecast capacity allowing for RRS Housing Predictions in Dorchester

Goods/Location	2012 (sqm net)	2017 (sqm net)	2022 (sqm net)	2026 (sqm net)
Convenience Goods: Scenario 2: Dorchester town centre	(122)	33	197	336
Comparison Goods: Scenario 2: Dorchester town centre	4,469	9,973	16,700	22,519

Source: Reasn Model Forecasts (Appendix 7 and Table 7.5)

CBRE
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9.3 If non central capacity is successfully redirected to Weymouth and Dorchester the levels of capacity will increase as highlighted in Tables 7.10 and 7.11

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

The Sequential Approach to Site Selection

9.5 Our approach to reviewing sites follows the guidelines of PPS6. PPS6 advocates that the sequential test should be applied when determining the most appropriate location for retail development. This sequential test recommends that centre, and then edge of centre sites should be considered in turn when planning for retail development. Where need cannot be accommodated in the existing centre, then local authorities should consider extending the centre by revisiting the town centre boundary. This approach is consistent with the 'town centres first' approach of PPS6, with the central aim to make them vital and viable destinations.

9.6 The distance thresholds used in applying the sequential approach and for searching for appropriate sites would differ for different types of development. Annex A in Table 2 of PPS6 provides a useful typology and of types of locations.

9.7 A town centre is defined as an area 'including the primary shopping area and areas of predominately leisure, business and other main town centre uses within or adjacent to the primary shopping area'. The Primary Shopping Area is defined as 'where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage)'.

9.8 For the purposes of retail development, edge of centre sires are those locations that are 'well connected to and within easy walking distance (i.e. up to 300 meters) of the primary shopping area'. For all other main town centre uses, including hotels, edge of centre sites are those 'likely to be within 300 meters of the town centre boundary.

9.9 It should be noted that in determining where a site lies in relation to the town centre of primary shopping area regard should be had to such matters as local topography, barriers to movement and the perception of the route.

9.10 When planning for retail development – and in light of the identified retail need – Councils should have regard to the initial five year period when allocating sites. The LDF for Councils will however extend over a longer time period and therefore consideration of strategic longer retail need is provided for Weymouth and Dorchester. A review of retail need and sites to accommodate this should be updated at regular intervals (say, every 5 years).

9.11 PPS6 also advocates that local authorities should take a more proactive role in facilitating retail development in centres. In particular, Councils should endeavour to assist in land assembly, and potentially through the use of compulsory purchase powers, and by forward planning through the allocation of potential retail sites (a plan led approach).

9.12 Our site specific comments are also based on the outputs from the retail capacity exercise and the likely quantitative and qualitative need for future retail development in each of the centres. In addition, we also draw on our qualitative knowledge of the office and leisure market for each centre (as referred to in the health checks), given that these uses are also potentially subject to the sequential test. Finally, our site review is also set in the context of known occupier requirements. Location plans for each of the sites described below are attached at Appendix 3.

Weymouth

9.13 The Weymouth and Portland Local Plan (2005) defines a 'Weymouth Town Centre Area (Policy E4) and this has been adopted for the assessment of sequentially appropriate sites. The retail capacity assessment baseline scenario identifies no capacity for additional convenience floorspace over the Plan period. Any improvement in the town centre foodstore provision would be expected to 'claw back' some trade from non-central areas and qualitatively enhance the offer. By 2012 therefore around 739sqm net of additional convenience capacity is identified. Similarly for comparison expenditure, assuming the reallocation of non central floorspace, by 2012 around 4,949sqm net of additional comparison floorspace capacity is identified, rising to 30,503 sqm by 2026 (Table 7.10). This indicates a need to plan for future retail development in Weymouth town centre, albeit that in the next 5 years (the timescales recommended by PPS6 to allocate sites for future need) the amount of floorspace needed is lower.

Land at John Street

9.14 This moderate sized site of approximately 0.25 acres, lies at the south western edge of the designated town centre. No specific planning policy relates to this site. The site currently comprises Lakeside Super Bowl bowling alley, together with associated surface car parking. The bowling alley is housed in a fairly low rise and unattractive building. Potentially, the redevelopment of the site (and possibly extending to adjacent buildings along Nicholas Street as well as the postal sorting and Telephone Exchange) could create a suitable retail development opportunity, and one which also seeks to enhance the environmental quality of this area.

9.15 We have undertaken a title search and can advise that Newbury Leisure Ltd acquired the land in 2004.

9.16 Potentially, if redeveloped this site could offer suitable accommodation for larger retailers. This might, for example, include a small scale foodstore operator or other quasi retail park style operators. Such development would help meet demand from retailers seeking larger units than are currently available in Weymouth. This site could also offer the opportunity to include additional leisure uses as well as residential units, if stacked above ground floor uses. Arguably, there is an emergence of a leisure sector in the western part of the town and improving the leisure offer here may well help to cement this further, subject to demand. This would particularly be the case if good links between the cinema and this site could be achieved, albeit a challenging prospect.

9.17 We would expect that any development at this stage should provide a more attractive frontage on to Nicholas Street, and if possible, Lower St Alban Street. Development could also be to a reasonably high density, which may be necessary to create a financially viable scheme.

9.18 There are, however, a number of constraints to development. Firstly, land assembly issues would need to be considered and especially if any existing rights of way or service/access routes exist. Secondly, if the bowling alley could not be accommodated in a new scheme then an alternative location may be necessary. Finally, as linkages to the retail core of Weymouth town centre may be somewhat difficult to achieve, the mix of uses may need to be a sufficiently strong enough attraction in their own right.

9.19 In terms of next steps, the Council should build a landownership profile for the area and enter into preliminary discussions with the occupier/owners of the site. There is also a case to consider a wider design and development brief planning exercise for this area, encompassing Nicholas Street, John Street and extending to and including the postal sorting office and the British Telecom Telephone Exchange. Potentially, this further work could be encapsulated as part of the forthcoming town centre Area Action Plan (AAP). Careful testing of the scope for development at this location could open up a greater opportunity to regenerate this area. Public sector intervention may also be needed through the use of compulsory purchase in order to create a suitable site, subject to the outcome of further feasibility/ viability studies.

- Priority – Moderate to low
- Timescale – Mid to long term

Colwell Shopping Centre

9.20 This dated shopping centre over two floors occupies a site of around approximately 0.25 acres. The centre was acquired by 10 Ant Ltd in 2002. The centre currently provides very small retail units for independent traders in an arcade style format. The centre is however poorly let and lacks a modern feel typically found with more successful shopping centres. The shopping centre is however more or less centrally located within Weymouth town centre and well integrated into the existing town centre retail offer, especially with the building fronting School Street.

9.21 This building/site could be used far more intensively. This could be through two possible routes. Firstly, there could be the opportunity to entirely redevelop the building, thus creating space for a number of retail occupiers. Alternatively, a refurbishment of the building could provide a similar amount of retail floor space. Whichever route were adopted, the result would be expected to be a far more attractive retail unit than is currently the case.

9.22 The obvious constraint on bringing forward this opportunity would be relocating existing occupiers. How readily this can be achieved will undoubtedly be dependent on the terms of their leases and the willingness of the current owners to regenerate this block.

9.23 As a first step, the Council should discuss with the shopping centre owner to understand their aspirations for the future and the potential opportunity this building could present. Subject to the outcome of these discussions, the Council could then assist with any redevelopment option through facilitating discussions with their planning department.

- Priority – High
- Timescale – Short to mid term

Park Street Car Park

9.24 This site of approximately 1.1 acres is currently used as a shoppers car park, accommodating around 200 spaces. Surrounding uses are predominately residential, although small scale retail units are present. The site is located at the edge of Weymouth town centre at the eastern periphery. This site could possibly be considered in conjunction with the car parking immediately adjacent and to the north of Commercial Road to provide a much a larger development opportunity. A key issue to examine in testing the potential of the site will be whether the loss of any car spaces occurring through the development would be acceptable, or if these spaces would need to be replaced. This would need to be determined through a detailed car park study for the town centre.

9.25 The freehold interest in the car park is held by Weymouth and Portland BC. In addition to the impact on town centre parking provision, any redevelopment options would have to account for the lost revenue from the existing car park.

9.26 Subject to the outcome of a car park study, were the site considered suitable for redevelopment then this land has potential to accommodate some retail uses. This might either be through providing space for small to mid size occupiers with units fronting Commercial Road, Woopertan Street, Park Street and Gloucester Street. Alternatively, the site may be attractive to larger occupiers who may favour this very visible site, although this may not sit so comfortably with the surrounding urban grain. The scale of the site should also allow for the inclusion of some residential uses on upper floors, especially if smaller retail units are preferred. The inclusion of residential uses might also be needed to create a viable scheme. There could also be the potential to develop a courtyard style development, thus allowing for a substantial amount of car parking to remain within the centre of the development.

9.27 As discussed above, the first step in investigating more fully the development potential of this site is to assess whether the loss of car spaces at this location would be acceptable, and if so to what degree. Thereafter, the Council could begin to consider more detailed proposals for the site, with particular reference as to how these may relate to the surrounding streets and also how the site could possibly act as link both between the core of the town centre and the active area of Weymouth marina. In that respect, the car park immediately to the north of Commercial Road might also be examined for its development potential. Testing the development potential of this site and wider area will rest on both the outcome of the car park study and subsequent detailed feasibility study for this area. Again the town centre AAP may be the most suitable vehicle to take forward this initiative.

- Priority – Moderate
- Timescale – Mid term

Bus Depot, Commercial Road/King Street

9.28 This edge of centre site of approximately 1.1 acres represents a key regeneration opportunity for Weymouth. Currently, the site is entirely occupied by the First Bus Group and used as a bus depot. Arguably this use does not sit comfortably with surrounding uses which are predominately residential.

9.29 At the very least, redevelopment of the site could provide for a number of small retail units fronting King Street. Such a development would be expected to complement the proposed improvements to the rail station which are currently being progressed by the Council. In this development format, then retail uses are likely to be ancillary to residential development. The retail units are likely to appeal to independent operators, and probably A3-A5 operators, benefiting from trade from the transport interchange. A more radical approach would be for the site to be developed out for a single or larger retail occupiers. This proposition would however need to be carefully designed to ensure no conflict with surrounding residential uses, and may well be a less viable prospect than a more mixed use approach. There could also be the opportunity to locate other uses here such as a hotel, should demand dictate.

9.30 The key overriding constraint to delivering this site rests with the ability to relocate the bus depot. It is likely the bus operators' key concern will be to ensure that distances travelled by buses do not increase as a result of any relocation. The bus depot was acquired by the bus operator, First Hampshire and Dorset Ltd in 2004.

9.31 Arguably, this type of use is not particularly well suited to a town centre location. Therefore, given this overriding issue, the Council should seek to enter into discussions with the current owners – First Bus Group – with a view to understanding their future proposals for the site, and whether relocation is an option they would consider further. Irrespective of whether the site does accommodate retail uses, a focus should still be put on regenerating this area.

- Priority – High
- Timescale – Mid to long term

Westwey Road South (The Gas Holder Site)

9.32 The land at Westwey Road comprises the National Grid gas holder and former Southern Electricity board depot. The site lies to the north of the town centre and is separated by Weymouth Marina, resulting in this opportunity being somewhat distant from the town centre retail offer. The site is currently allocated for housing under policy H1d in the local plan. In 2002 the Council commissioned a development viability study of the site and several adjacent plots of land. The report concluded that in order to achieve viable scheme housing would need to be the key development use, and that there would be a need to maximise vertical use of space. The report does however point towards the potential to include other uses, such as retail. This might for example include a medium sized foodstore, albeit that the close proximity of the existing Asda store may deter some occupiers, but not all. The site could also allow for an extension to the Asda store, although we are aware this operator already considers the site to be operationally constrained. Alternatively, a mixture of small scale retailing and housing might also create a viable prospect.

9.33 To bring this site forward for redevelopment will require a number of key tasks. Firstly, assembling the site will be a key priority. This could be done through some form of landowner agreement. Alternatively, the Council could be minded to exercise compulsory purchase powers should this be necessary. Discussions with the land owner should also reveal the current activity on the site and what relocations would be required. Issues of contamination will also need to be investigated. Assuming that the land can be assembled then the next step would be for the Council in conjunction with the landowners to prepare a design brief for the site (we understand that a previous development brief has been prepared for the site in 1996. However given that a considerable time has now lapsed it would be worthwhile updating this brief in light of the current property market and likely demand drivers) in particular a re-evaluation of the viability of redevelopment would be required. Financial viability issues may well dictate the extent to which this site can accommodate retail uses.

- Priority – Moderate
- Timescale – Mid to long term

Dorchester

9.34 The retail capacity assessment baseline scenario identifies limited convenience capacity for additional floorspace over the Plan period. Any improvement in the town centre foodstore provision would be expected to 'claw back' some trade from non-central areas and qualitatively enhance the offer. By 2012 therefore around 410sqm net of additional convenience capacity is identified. Similarly for comparison expenditure, assuming the reallocation of non central floorspace, by 2012 around 5,433sqm net of additional comparison floorspace capacity is identified, rising to 28,850 sqm net by 2026 (Table 7.11). This indicates a need to plan for future retail development in Dorchester town centre, albeit that in the next 5 years (the timescales recommended by PPS6 to allocate sites for future need) the amount of floorspace needed is lower.

Land at Charles Street

9.35 The Charles Street development opportunity extends to 4 acres. This edge of centre site, to the east of South Street, is currently used as surface car parking, accommodating around 500 spaces. The topography of the site means that careful design solutions will be needed to suitably integrate this opportunity into the existing town centre.

9.36 The West Dorset Local Plan allocates this site for retail led development [Policy EA14]. The site is also subject to a Planning Brief (1999), which was informally updated in 2006. The Brief defines more clearly the types of uses that would be acceptable on this site and particularly retail, leisure and residential uses. We are also aware that Simons Developments have a development agreement with West Dorset Council (the main landowner) to bring forward development at this location.

9.37 The site offers an excellent opportunity to extend Dorchester's retail offer. Potentially, the site could accommodate a significant anchor store, as well as other unit retail shopping at ground floor level. On upper levels there is also the opportunity to diversify the mix of uses coming forward. This mix could include residential, hotel and perhaps some office space. Above all, any proposals will need to be suitably integrated with the existing town centre retail offer. The site is well disposed to achieve this: strengthening the pedestrian links between Charles Street and South Street could be achieved through improving the pedestrian route of Durngate Street, Tudor Arcade and Hardye Arcade. This may also offer the opportunity to improve the retailing provision on these links. This might include improvement to the rear of the Nappers Court, and providing larger units along Hardye Arcade, were this to better meet retailer requirements.

9.38 The Council has already well progressed this site through the development pipeline. Appropriate planning policy and supplementary planning guidance is already in place to support regeneration, and a development partner has been selected by the Council. Without doubt, this site offers a prime development opportunity which would be expected to strengthen Dorchester's retail offer.

- Priority – High
- Timescale – Short to mid term

Land to the West of Trinity Street

9.39 This site of around approximately 1.16 acres offers Dorchester's second key redevelopment opportunity. The land is currently used as shoppers' car parking, and associated with the Somerfield foodstore. In addition, there are a number of smaller service units fronting Trinity Street, including a doctor's surgery and public house. The site is reasonably well related to the prime retail pitch of South Street.

9.40 The core of the site should be considered as the Somerfield car park and the adjacent surface car parking to the south. The plot of land at the junction of Bowling Alley Walk and Trinity Street (occupied by Iceland, and a public house) could also possibly be brought into the redevelopment equation. Potentially this could create a far more attractive development proposition, albeit that any proposals will need to be carefully financially tested given that the cost of acquiring this land may be considerable. Inclusion of the Somerfield store itself may also be advantageous in formulating a scheme here, but again this would rest on the financial viability of including this interest.

9.41 Presently, the Local Plan allocates part of this site for mixed uses under policy EA16. This includes retail.

9.42 Site constraints relate to the re-provision of car parking, were any loss to occur through redevelopment. This would need to be tested through a detailed car park study, encompassing all parking within the town centre (and accounting for any increased provision at Charles Street). Land assembly issues would also need to be investigated further, especially as the site is in at least two ownerships. Indeed, were the site to be extended southward to include the Iceland foodstore then land assembly issues would become more complex and the use of CPO powers – or the potential threat of – might well be needed.

9.43 The car park to the north of the site is within single ownership having been acquired in 2002. A number of leasehold interests are also attributable to the site, particularly in the Forum Centre; these generally expire around 2022/23.

The car park to the south of the site is currently unregistered land.

9.44 In terms of a development mix, this site could offer a good opportunity to secure larger retail units in the town centre. Possibly, the site could provide a suitable location for a Retail Park. Alternatively, the site could appeal to a foodstore operator, or more probably allow Somerfield to extend their store were the company seeking to increase their representation in the town centre. Ideally, however, creating a stronger frontage on to Trinity Street would be a positive redevelopment benefit. Also, if possible, upper floors of any new development could be suited to a mix of residential and service/office uses.

9.45 Given that there are a variety of potential design outcomes for this site an appropriate next step would be to begin to draw up indicative proposals for testing the feasibility and viability of proposals in more detail. This would need to be undertaken in conjunction with the key stakeholders in the area such as Somerfield and Iceland. Subject to the outcome of this exercise then the Council may wish to consider allocating this site in the Local Development Framework (LDF) as a potential redevelopment opportunity. Above all however, priority should be given to delivering the Charles Street site first.

- Priority – Moderate
- Timescale – Mid to long term

Infill Sites

9.46 There are a number of small infill sites that if regenerated could help to contribute to the overall retail and townscape offer of Dorchester. From our centre survey these are identified as follows:

- 9-10b Trinity Street – a series of small, low density outlets, including taxi hire and garages. This site could offer the potential to provide more active frontages at ground floor level with residential stacked above.
- Land at the junction of Trinity Street and New Street – a small but important corner site. This land is currently used for parking and servicing nearby retail units. If land were assembled it could offer a small development opportunity which in turn would provide a stronger building frontage at this visible location. It would also help complement the new development which has recently occurred immediately to the north at the former post office site.
- Land to the north of Marks and Spencer, Trinity Street – a small infill site comprising surface yards/parking. Redevelopment of the site could provide ground floor retail (A1 – A5) units together with possibly residential or even offices stacked above.

9.47 All of these sites are more likely to be brought forward by the private sector, although the Council could begin to initiate the process by engaging with landowners.

Strategic Overview - Weymouth

9.48 The possible retail sites in or on the edge of Weymouth town centre are generally challenging to deliver. Almost all will require local authority intervention (including possible use, or threat of, compulsory purchase), if they are to be brought forward for redevelopment, hence the longer term timescales associate with the more complex opportunities. Presently, it is difficult to see where larger scale retailing operators could locate in the centre (albeit operators are expected to be more flexible in their requirements than has been the case in the past). Existing retail commitments such as at the Pavilion will however be expected to soak up some of the available retail capacity in the short term. Extensions to existing town centre stores, provision of mezzanines alongside refurbishment and reuse of vacant units will also reduce the available capacity. Nevertheless, proactive planning of the possible town centre retail sites could enable their reuse for retail purposes. This would entail more detailed design and financial testing of indicative schemes. In turn, these sites could help meet future retailing requirements. Otherwise, the Council may face growing pressure from retail developers for out of town development.

9.49 The Council must also begin to consider the longer term retail need identified for the town centre. It is unlikely that the sites identified will have sufficient scope to accommodate all of the retail need identified to 2026. In these circumstances, Councils are tasked with examining the potential to extend the town centre. For Weymouth, the area which seems to offer the best development opportunities - and ones which offer good links to the existing town centre and are accessible – lie at the northern fringe of the current Weymouth town centre area. This would include not only car parks at Park Street and adjacent to the marina, the best depot but also extending to land at the train station and to the edge of Jubilee Retail Park.

9.50 Potentially, the ideal vehicle to test the scope for development in this area will be the town centre AAP. If however, it is felt that the timescales associated with adoption of the AAP are too distant (and indeed this may be the case for other possible sites identified above), possibly a separate master planning exercise could be progressed beforehand. This work could then be integrated into the AAP as it evolves. The key outputs of this exercise will be to test options for development in this eastern fringe area, with a focus on feasibility and viability issues, and having regard for the area's potential to accommodate additional retail units and connecting this area better with the existing town centre.

Strategic Overview - Dorchester

9.51 Dorchester's vibrant and healthy town centre has generated a good level of retailer demand. The retail study also indicates that there is substantial capacity to extend the town centre offer, especially for comparison goods. Undoubtedly, Charles Street offers the best opportunity to achieve this – the site is well located, is suitable and potentially available to accommodate a retail led scheme. The key to the success of retail proposals here will be the ability to forge appropriate links with the existing town centre. The selection of a development partner by the Council suggests that a viable scheme can be created. Development at Charles Street would also be expected to help improve the competitiveness of the centre, and this opportunity should be seen as a priority.

9.52 The Charles Street proposals, together with the Brewery development would also be expected to meet the identified retail need to at least 2012, and possibly up to 2022. Other smaller infill sites may also contribute toward meeting retail need. Thereafter, the land at Trinity Street could offer further scope to extend Dorchester's retail offer, albeit that proactive planning by the Council may be required to assemble the site.

10

CONCLUSIONS

CONCLUSIONS

10.1 Our retail and leisure assessment shows that capacity in terms of available expenditure exists within the catchment area to 2026.

10.2 Both Weymouth and Portland Borough and West Dorset District Councils are covered by emerging RSS for the South West which identifies both Dorchester and Weymouth as 'strategically significant cities and towns'. Such centres are recognised as places which offer the greatest opportunity for employment, and the greatest levels of accessibility. Weymouth and Dorchester are also specifically identified in the Structure Plan which acknowledges the benefits of retail development as a focus for economic regeneration.

10.3 Aligned with the Structure Plan the West Dorset District Local Plan identifies Dorchester as a town centre where development should be permitted and in accordance with this retail development is being promoted on Charles Street consistent with the qualitative and quantitative need for new shopping in the catchment area. Similarly policies in the Weymouth and Portland Local Plan seek to direct new retail and leisure proposals to the town centre and Harbour side commercial areas.

10.4 The area as a whole is recognised as a tourist destination and as part of our capacity assessment we have sought to quantify the likely levels of expenditure generated within the catchment area on convenience and comparison goods (Scenario 1, Section 5).

10.5 As the area is also expected to accommodate significant growth in population over the coming years, as identified by the emerging RSS, Scenario 2, (Sections 5/6) sought to model this proposed increase over the Plan period. The results of this exercise are summarised below:

Scenario 2 - Capacity for additional Retail Floorspace at 2026

Centre	Convenience (sqm net)	Comparison (sqm net)
Weymouth	(271)	23,639
Dorchester	336	22,519
Non-Central	5,512	28,778

Source: Retail capacity tables Appendix and Table 7.9

10.6 In addition to the two scenarios identified above, regard was also had to capacity identified in non central areas and the implications of this capacity upon planning positively for existing centres. Whilst no capacity exits for additional convenience floorspace in Weymouth and only limited capacity for Dorchester based upon Scenarios 1 or 2, it is recognised that additional convenience floorspace in both centres could improve their respective market share and reverse leakage to out-of-centre foodstores.

10.7 If this additional capacity is directed towards existing centres this creates capacity for additional convenience floorspace in Weymouth of 2,288sqm net and in Dorchester of 1,479sqm net by 2026 as summarised below:

Summary of total available capacity in Weymouth allowing for reallocation of non central floorspace

Goods/Location	2012 (Sqm net)	2017 (Sqm net)	2022 (Sqm net)	2026 (Sqm net)
Convenience Goods: Scenario 2: Weymouth urban area	739	1,260	1,818	2,288
Comparison Goods: Scenario 2: Weymouth urban area	4,949	12,772	23,312	30,503

Source: Table 7.10

Summary of total available capacity in Dorchester allowing for reallocation of non central floorspace

Goods/Location	2012 (Sqm net)	2017 (Sqm net)	2022 (Sqm net)	2026 (Sqm net)
Convenience Goods: Scenario 2: Dorchester urban area	410	722	1,155	1,479
Comparison Goods: Scenario 2: Dorchester urban area	5,433	12,383	21,314	28,850

Source: Table 7.11

10.8 It is considered unrealistic to assume that all non central capacity will be directed to the existing centres and therefore some capacity will exist over the plan period.

10.9 Overall we conclude that there is capacity to support substantial new comparison floorspace in both Weymouth and Dorchester town centres over the plan period. This increase in quantitative terms will need to be balanced by qualitative improvements if the centres are to increase their market shares.

10.10 This capacity should be accommodated by more efficient use of land and buildings within existing centres. In determining the level of need for additional retail floorspace within the catchment area we considered capacity in Dorchester and Weymouth and also in those areas beyond the identified centres of Bridport, Lyme Regis, Sherborne and Beaminster. This is identifies to as 'non-central' areas in Scenarios 1 and 2 and Appendices 6 and 7.

10.11 In promoting and enhancing existing centres and considering where this capacity should be accommodated regard should be had to the network/hierarchy of centres in the catchment area, any over concentration of growth in higher level centres, the need for investment and growth to strengthen other centres and the need to address deficiencies in the network.

10.12 Having visited and reviewed the various centres in the catchment area we conclude that this capacity should be directed to Dorchester and Weymouth in the first instance. However it is also acknowledged that the remaining centres in the hierarchy could also accommodate some of this capacity subject to it not adversely affecting the centres position in the retail hierarchy. An element may also be taken up by extensions to existing non central 'bulky goods' operators.

10.13 Where growth cannot be accommodated in identified centres, local planning authorities should plan for the extension of the primary shopping area where need is identified for additional retail provision or, where appropriate, plan for the extension of the town centre boundary to accommodate other main town centre uses. This is something that may need to be considered in Weymouth towards the latter part of the plan period if current trends continue. In particular, land to the north of the existing town centre including the train station areas and up to Jubilee Park should be examined in more detail to assess its full potential to accommodate additional retail development. Further feasibility and viability work should be undertaken, ideally in conjunction with the Area Action Plan process.

Weymouth

10.14 Weymouth is the primary retail centre within Weymouth and Portland Borough Council's administrative area. The town centre as identified on the proposals map currently provides approximately 1,530 sqm net of convenience floorspace and a further 22,423 sqm net of comparison floorspace (Appendix 6 Table 5a).

10.15 The full findings of our health check for both towns are contained in Section 4 of this report. In summary we conclude that Weymouth is a vital and viable centre benefiting from good representation of comparison retailers as well as strong demand from occupiers. There was also a strong representation from the service occupiers which is to be expected given the centre's position as the service centre within the Borough.

10.16 Our assessment did identify a below national average provision of convenience representation within the town centre. It is evident that the existence of free standing, easily accessible food stores beyond the town centre, in particular Asda on Newstead Road, Morrison's and the discount offer of Lidl on Dorchester Road and Aldi on the Jubilee Retail Park, results in considerable levels of expenditure leakage from the town centre. By way of example, only 5.5% of shoppers in Zone 6 (Weymouth) undertake their main food shopping in Weymouth town centre. By comparison, 60% and 27% undertake this form of food shopping in Asda and Morrison's, respectively. It is not therefore surprising that the town centres foodstores, as a group appear to be under trading.

10.17 Despite this, the town centre's qualitative provision; consisting of a Tesco Metro, Iceland and Marks and Spencer; offers a good representation and as a result there is no further capacity for convenience provision at this time. It is also evident from our health check that the centre benefits from below national average number of vacant retail units and a decreasing prime rental yield demonstrating confidence in the centre as a whole and particularly for retail.

10.18 Going forward, increases in the representation of quality fashion retailers would be expected to enhance and diversify the centre's offer. The current size of retail units may be detracting national retailers from locating in the town so to attract such operators may however require modern units of a suitably large scale.

10.19 In considering the leisure provision with Weymouth clearly the centre benefits from a range of facilities and proposals including the Esplanade, Pavilion Theatre and the hosting of the sailing elements of the 2012 Olympic Games will further enhance the centre's leisure profile. However based upon our assessment (Section 8) the existing provision is considered adequate to meet current and projected requirements to 2016 and beyond.

10.20 In planning for growth PPS6 requires local planning authorities to identify sufficient sites to meet the identified need for at least the first 5 years from the adoption of their development plan documents. It also acknowledges that for a large town centre scheme, a longer period may be appropriate for site assembly. We would therefore recommend that the Council seek to make provision within the emerging LDF to accommodate in the region of 1,300 sqm net of convenience floorspace and 13,000 sqm net of additional comparison floorspace, sufficient to meet the identified need to 2017 (Table 7.10). This situation should be regularly reviewed to ensure that sufficient sites are being promoted as the plan progresses.

10.21 Although Weymouth is constrained by the coastline and by virtue of its built environment a number of sites have been identified as potentially suitable for retail as well as other purposes to accommodate the identified capacity to 2017. In particular, the bus depot at Commercial Road should be afforded the greatest priority by the Council along with car parks becoming available as part of the Council's current review strategy. As identified in Section 9 we consider that a high degree of public sector intervention will be needed for this site. Indeed, all the sites identified at Weymouth may require a proactive approach by the Council, if their potential is to be released.

10.22 Even after allowing for the possibility of refurbishment and redevelopment coming forward in the town centre of such for instance the Colwell Shopping Centre, it is likely that if current trends continue the Council may need to consider extending the town centre boundary. Although the assessment should be regularly reviewed, additional work would also need to be undertaken to inform this option. A possible option could be to include the established Jubilee Retail Park and the surrounding station and car park. Whilst this is not without its problems in terms of land assembly and the aspirations for a consolidated transport interchange on the site this could provide additional space to accommodate capacity also benefit from its proximity to the railway station/interchange. If this option is to be considered however it will be important to ensure that it is compressively planned so as to avoid a shift in the retail heart of the town.

10.23 Whilst we consider that Weymouth is a healthy centre it should seek to evolve and improve if it is to continue to compete effectively with other nearby shopping destinations. Whilst major new retailing development in the town centre is a challenging prospect, much more could be done to integrate the built and waterside settings of Weymouth together. In turn, this could enhance Weymouth's reputation not only as a shopping destination, but also somewhere to combine this with more leisurely pursuits, thus creating a more individual centre.

Dorchester

10.24 Dorchester is the largest centre in West Dorset and also the County Town. Against the assessment of capacity and health check for the centre must be considered the proposal to provide further retail units at Charles Street, immediately to the east of Cornhill/South Street – the main retail area within Dorchester. It is also pertinent to note that the Tudor shopping centre which links this site to the high street has also been purchased by property developers and proposals may come forward in the future for a refurbished/reconfigured shopping centre.

10.25 Dorchester currently provides about 2,890 sqm net of convenience floorspace and a further 18,818 sqm net of comparison floorspace (Appendix 6 Table 5b). The proposals at Charles Street could potentially increase the current floorspace in the town centre, though at this time figures have not been made available.

10.26 Based upon our health check we conclude that Dorchester has an attractive and healthy shopping core with low numbers of vacancies. Whilst some secondary areas are less appealing this has not detracted from the level of comparison retailers in the town and the high level of demand registered from operators to locate in the centre.

10.27 In contrast to Weymouth, Dorchester's leisure offer is limited serving a more niche market. Based upon our assessment we conclude that the current level of provision whilst acceptable could be reinforced by the provision of bars and restaurants. However such uses should not be at the expense of active retail frontages.

10.28 Once the proposals are progressed at Charles Street and the refurbishment of the area completed, we would expect the town centres offer to improve as well as the attractiveness of the centre. However, the promotion of the town centre should remain a continuing priority of the Council to ensure that the town remains strong and capable of competing with surrounding higher order centres such as Yeovil.

10.29 Based upon our assessment we recommend that the Councils make provision within the emerging LDF to accommodate in the region of 800 sqm net and 13,000 sqm net of convenience and comparison floorspace, respectively. This will meet identified capacity to 2017.

10.30 In terms of convenience provision there is already a range of modern foodstores within the town centre including Marks and Spencer, Waitrose and Iceland. In addition there is a large Tesco superstore on the outskirts of the centre and the results of the household survey show that within Zone 5 (Dorchester) 37% of shoppers visit the stores in the town centre with 51% choosing to visit the Tesco on the outskirts of the centre for their main food shopping. As with Weymouth we believe that it is realistic that were a foodstore to be promoted in the town centre it too would 'claw back' expenditure from the existing Tesco foodstore.

10.31 In considering sites to accommodate the level of identified capacity, our review of potential sites has been considered within the context of the proposals for Charles Street. We therefore recommend that in the short term the expenditure of Dorchester town centre rests with the bringing forward of Charles Street. Even if the proposals were not to come forward for some reason, we consider it realistic to assume that the site should remain the most suitable for future retail development.

10.32 The bringing forward of other sites as the plan evolves to accommodate this additional capacity, for instance Trinity Street car park, should be monitored as the Charles Street proposals evolve. Finally it should be remembered that the identified capacity resulting from the claw back of expenditure by Charles Street will need to by adjusted as the application becomes a commitment.

10.33 This assessment of capacity is based upon a number of variables which can change over time. Our assessment of convenience and comparison floorspace capacity over the Plan period focuses upon Weymouth and

Dorchester in this report, with the smaller market towns of Bridport, Sherborne, Lyme Regis and Beaminster covered in the Supplementary Report (December 2008).

10.34 To enable West Dorset and Weymouth & Portland to plan positively and to inform their respective LDFs we also have regard to the broad quantum of floorspace that each District should plan for over the Plan period. These district wide figures should be treated as an indication of the likely level of capacity that should be planned for and not treated too prescriptively. As with all assessments of capacity the resultant amount of floorspace is a factor of among other variables the turnover of floorspace. This is best illustrated when considering convenience floorspace where the company average turnover of the top four foodstores equates to something in the region of £11,500 per sqm against that of discounters which turnover at approximately £4,759 per sqm net on average. The level of floorspace supportable therefore depends upon the final operator.

10.35 This Study has been a joint assessment for West Dorset District Council and Weymouth & Portland Borough Council and should be read in conjunction with our Supplementary Assessment of Other West Dorset Market Towns (2008). Whilst the scope of this assessment has been to assess capacity/need for additional retail floorspace in Dorchester and Weymouth to aid the Council's in planning positively we summarise below the amount of floorspace that should be planned for in West Dorset District and Weymouth & Portland Borough over the Plan period. This is based upon an increased population in line with the aspirations of the RSS (Scenario 2), the assumption that non central capacity will be attracted to existing centres (based upon current market share) and in relation to West Dorset, includes the capacity identified within Bridport, Lyme Regis; Sherborne and Beaminster.

District/Borough wide convenience capacity

	2012 (sqm net)	2017 (sqm net)	2022 (sqm net)	2026 (sqm net)
West Dorset District	2,167	2,886	3,754	4,445
Weymouth & Portland Borough	739	1,260	1,818	2,288

District/Borough wide comparison capacity

	2012 (sqm net)	2017 (sqm net)	2022 (sqm net)	2026 (sqm net)
West Dorset District	9,369	24,061	42,014	57,487
Weymouth & Portland Borough	4,949	12,772	22,312	30,503