Poole and Purbeck Retail Town Centre Retail and Leisure Study

Volume 2 – Town Centre Health Checks

On behalf of **Borough of Poole Council** and **Purbeck District Council**

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1 Introduction to Healthchecks

1.1 Introduction

1.1.1 In this section, we set out a detailed assessment of the performance of the principal centres in the Borough of Poole and Purbeck District – the centres of Poole, Upper Parkstone, Ashley Cross, Broadstone, Swanage, Wareham, Corfe Castle and Wool. For each centre we review their performance against indicators of town centre vitality and viability set out in the **Planning Practice Guidance**, summarised below:

Vitality and viability of town centres: key indicators
• diversity of uses • proportion of vacant street level property • commercial yields on non-domestic property • customers' views and behaviour • retailer representation and intentions to change representation • commercial rents • pedestrian flows • accessibility • perception of safety and occurrence of crime • state of town centre environmental quality

Source: Planning Practice Guidance (section: 'Ensuring the vitality of town centres', para 005)

1.1.2 Our analysis is based on:

- Site visits to each centre, undertaken by PBA
- Experian Goad land use/diversity of uses data for the town centres of Poole, Swanage and Wareham;
- Other published retail information, including the CoStar Focus Commercial Property Database and the IGD; and
- Information provided by officers at the Borough of Poole and Purbeck District Council.

1.1.3 The amount of information available for each centre varies in relation to its size; therefore whilst there is a significant amount of published data to support our analysis of the larger centres, for the smaller centres we rely principally on our own qualitative observations.

1.1.4 As part of the health checks we consider vacancy rates and diversity of uses in particular. Vacancy rates are considered as the proportion of the number (or in some cases floorspace) of vacant properties compared to the total for that area, and again to the national averages which provided by GOAD. In our analysis of the diversity of uses we classify the uses into convenience, comparison, service and miscellaneous, which are defined in Table 1.1.

Table 1.1: Diversity of use description and GOAD categories included

Header	Description	GOAD categories included
Convenience	This includes expenditure on goods characterised as more perishable and non-durable, often food and beverage spend, where expenditure occurs more often and routinely. GOAD classifies this as the following categories:	Bakers Butchers Greengrocers & fishmongers Grocery and frozen foods Off-licences and home brew Confectioners, tobacconists, newsagents
Comparison	Comparison units: expenditure on goods characterised as more durable, where expenditure is more likely to occurs as a one-off spend rather than weekly, for instance household goods, furniture DIY and so on. GOAD classifies this as the following categories:	Footwear & repairs Men's & boys' wear Women's, girls, children's clothing Mixed and general clothing Furniture, carpets & textiles Booksellers, arts/crafts, stationers/copy bureaux Electrical, home entertainment, telephones and video DIY, hardware & household goods Gifts, china, glass and leather goods Cars, motorcycles & motor accessories Chemists, toiletries & opticians Variety, department & catalogue showrooms Florists and gardens Sports, toys, cycles and hobbies Jewellers, clocks & repair Charity shops, pets and other comparison
Service	This includes expenditure on units that offer a service to local residents, as opposed to offering goods.	Restaurants, cafes, coffee bars, fast food & take-aways Hairdressers, beauty parlours & health centres Laundries & drycleaners Travel agents Banks & financial services (incl. accountants)

		Building societies Estate agents & auctioneers
Miscellaneous	These are units that whilst may offer a service, their uses are less commercial, and are more likely to be community buildings such as tourist information buildings. Typically, these comprise a very small proportion of the total high street units.	Employment, careers, Post Offices and information

2 Poole Town Centre health check

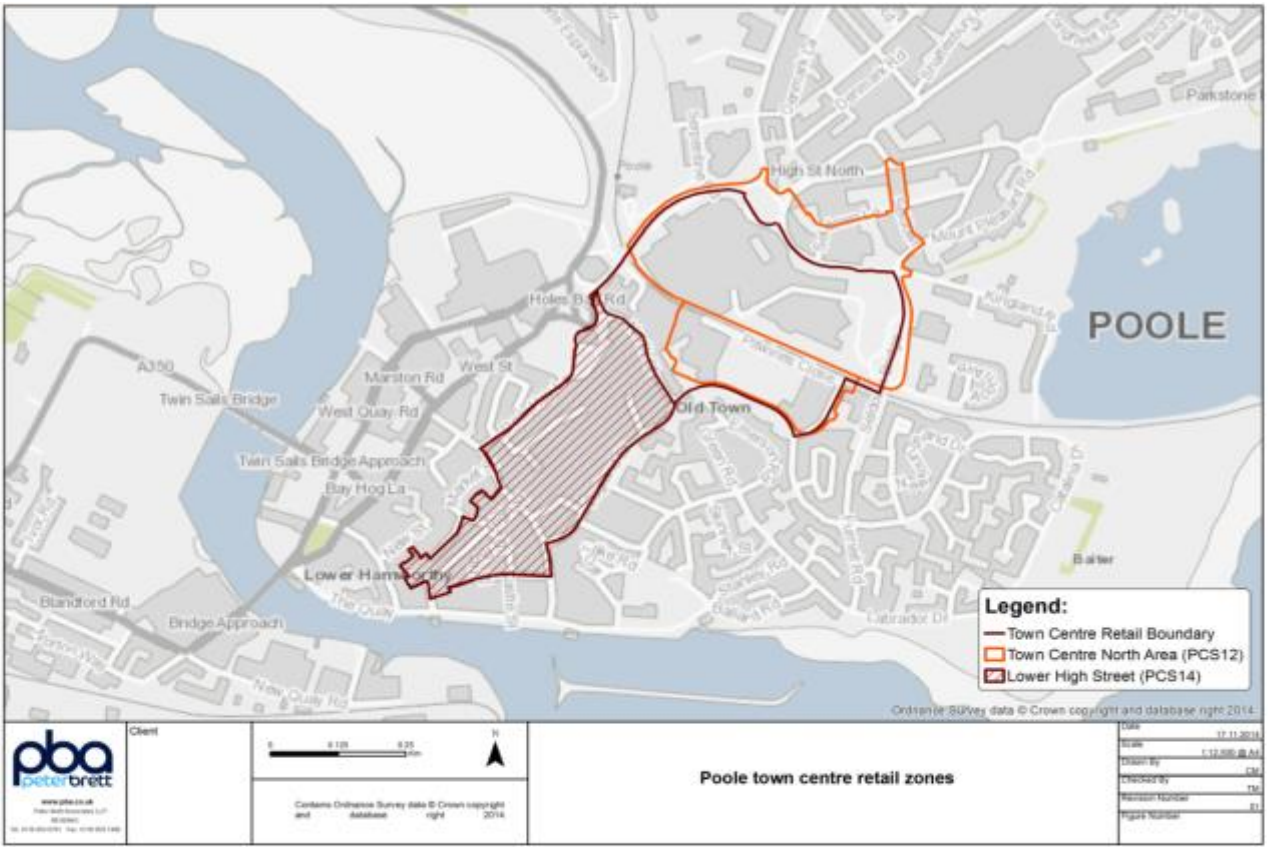
2.1 Introduction

2.1.1 Poole Town Centre is a large coastal town with a retail environment consisting of just over 350 retail units. The Town Centre has a number of distinct areas where the offer, mix and quality of the retail environment differs considerably.

2.1.2 Poole's adopted core strategy defines the town centre of comprising of the following broad locations:

- Town Centre North – This area consists of the Dolphin Centre, the Lighthouse Arts centre, the northern part of the High Street including Kingland Crescent, Falkland Square and the small number of units immediately north of North Street prior to the level crossing.
- Lower High Street - This area consists of the majority of the units on the High Street, starting with the units immediately south of North Street to the start of the Quay.
- The Regeneration area - This section is located quite a distance west of the main retail environment. As much of this area is intended to for housing rather than retail units, it will not be the focus of this study.

Figure 1.1 Town centre retail boundary.



Source: Poole Adopted Core Strategy

2.1.3 In analysing data on vacancy and diversity of use, we refer to the definitions of the ‘Town Centre North’ and ‘Lower High Street’. Additionally, there are a number of units that fall outside of these boundaries such as the retail units along the Quay and the large Asda which shall be categorised as ‘Outside of the boundary’. However, prior to discussing specific data on vacancy and diversity, the following section gives an overview of the main retail environments found in Poole.

The Dolphin centre

2.1.4 The Dolphin centre is a shopping mall consisting of over 100 units, predominantly national multiples and large department stores. Situated at the most northern point of the High Street, and connected to the Poole’s main bus station, this can be recognised as Poole’s primary retail environment.

2.1.5 Originally built in 1969, the building has undergone a number of refurbishments in recent years to update its appearance. As such, the mall appears relatively clean and well maintained, however in comparison to a number of other malls throughout the UK a number of the units still appear to show some signs of becoming slightly dated.


Figure 1.2 and 1.3: Dolphin Centre, Poole

2.1.6 This area is predominantly where the majority of Poole’s convenience retailers are located, with many nationally recognised stores such as Primark, Marks and Spencer’s and BHS all having a significant role in attracting consumers to the area. The department store Boules, which has a long association with the town and neighbouring area, also is located within the Dolphin Centre and is also a focal point in the centre. In general, the range of the retail offer can be considered as particularly good with a number of other retailers such as River Island and Topshop which are focussed towards a younger market.

Falkland Square and Kingland Crescent

2.1.7 Falkland Square and Kingland Crescent are two sections of the Poole retail environment that occupy the immediate shopping area around the Dolphin Centre. Falkland Square is situated at the very north of the High Street and provides an entrance into the Dolphin centre, whilst Kingland Crescent also provides a small row of retail units east of the High Street that also provides an access to the Dolphin centre.

2.1.8 The area also has a number of national multiples such as Argos, Poundland and various mobile phone network providers such as EE, O2 and Three. Whilst many of the units are national multiples the occupiers are, on the whole, not of the same profile as those found in the Dolphin centre. This area, particularly Kingland Crescent, has a number of smaller units compared to the Dolphin centre where there is a greater mix of local retailers. Additionally, the urban realm in both Falkland Square and Kingland Crescent is particularly lacking and many of the units are of poor quality.



Figure 1.4, 1.5 Falkland Square, and 1.6 Kingsland Crescent

Poole High Street

2.1.9 Poole's High Street is another distinct retail environment within the Town Centre with the majority of the units considered as belonging to the Lower High Street. Only a small number of the units at the northern most section of the high street (between North Street and the level crossing) are classed as belonging to the 'Town Centre North' area in the Core Strategy.

2.1.10 The retail units are arranged on a single linear street that runs from the Dolphin centre in the north to the Quay in the south. The majority of the High Street is pedestrianized, with the exception of parts of the south of High Street, which creates a coherent and easy to navigate shopping experience. Many of the buildings along the High Street are of a poor state and many areas of the High Street lack vitality, particularly towards the southern-most part of the High Street, near New Orchard Street. Consequently, at the time of the survey, there appeared a number of vacant properties present in this location which is a cause for concern.

2.1.11 There are comparatively fewer comparison units situated here, with more nationally recognised retailers more prevalent in the Dolphin centre and, to a lesser extent, Falkland Square. The area does have a significant representation in convenience retailers with a large Sainsbury's located to the east of the High Street and a large Asda located a short distance to the west of the centre.

2.1.12 Many of the units cater for lower income groups, with a number of budget retailers such as Iceland, various charity shops and a 99p store. The quality of the stores deteriorates the further south of the High Street and is particularly poor where New Orchard Street intersects the High Street.


Figure 1.7 and 1.8: Poole High Street

2.1.13 Past this intersection and up to the Quay area, the retail offer changes slightly with a greater prevalence of restaurants. The quality of the urban realm improves considerably with a number of attractive buildings and seating areas, such as those opposite the Sainsbury's Local and Slug and Lettuce. This location has an historic feel as part of Poole's Old town, there are a number of listed buildings both lining the street and in the streets immediately north of this area.

2.1.14 The streetscape, as a whole, is greatly improved in this area too. Unlike the rest of the centre, this area appears greener with a number of trees lining the streets, creating a more attractive setting. Pavements throughout this area are considerably better than other areas in the high street, particularly the lighting along the street this street which also provides a more welcoming feel to this area of the town.

Figure 1.9 and 1.10: Poole High Street (lower section close to the Quay)

The Quay

2.1.15 At the southern-most point of the High Street is Poole's Quay, which lies outside of the town centre boundary. This area has a clear focus towards the leisure industry with the Poole museum, a couple of hotels and the majority of the rest of the units either restaurants, pubs or bars. Similarly this is where much of Poole's night time economy is situated.

Figure 1.11 and 1.12 Poole Quay side

2.1.16 Along the Quay, there are many properties of aesthetic merit, perhaps most notably the unusual green exterior of the Poole Arms. This line of units (pictured) reflect Poole's nautical history and is a popular tourist destination. Additionally, there are a number of tourist attractions such as Poole Museum (Figure 1.14). The area has relatively fewer comparison and convenience retailers, with the majority of these located within the modern Dolphin Quay (Figure 1.15) building.

Figure 1.13, Poole Quay, 1.14 Poole Museum and 1.15 Dolphin Quay

2.2 Vacant units

2.2.1 Vacancy rates are particularly high in Poole Town Centre. Across the entire town centre, the figure is 16.8% of all units which is particularly high in comparison to the national level (12.5%). In terms of floorspace, vacancy in the Town Centre equates to approximately 10% of the total retail floorspace. In comparison to figures from the previous year many of the vacant properties have remained vacant, which is also a cause for concern.

Table 1.1 Poole centre vacant units comparison with national average

	UK average	% of units	Difference to UK average
Vacant units	12.5%	16.8%	+4.3%

PBA research (2014) and Goad data (2013)

2.2.2 When looking at individual areas it can be seen that vacancy rates are high across all areas. Interestingly, vacancy rates appear higher in the 'Town Centre North' area than they do in the 'Lower High Street'. This is interesting as the 'Town Centre North' area appears relatively more affluent than the 'Lower High Street'. The majority of the vacant properties found in the 'Town Centre North' section are located within Falkland square and Kingland crescent.

2.2.3 Additionally, at the time of the study, there were a significant number of vacant properties on the first floor of the Dolphin centre. Of the total number of properties on the first floor over 25% appeared vacant. On the ground floor it can also be seen that the number of vacant properties have increased since this time last year, which is a cause for concern for the high street.

2.2.4 In terms of the 'Lower High Street' there is a slight divide in rates. The upper section of the high street has much fewer vacant properties than the lower section, where there are a number of pockets of vacant properties, notably near New Orchard Street. Since the previous year, a number of the vacant properties in this area have become occupied one of which, 58 High Street, appears to have been brought into use as a pop up bicycle shop, suggesting efforts are being made to readdress this problem in the high street.

Table 1.2 Poole centre vacant units comparison with national average

	UK average	% of units in Poole
Lower High Street	12.5%	13.9%
Town Centre North	12.5%	14.9%
Outside of the boundary	12.5%	28.4%

PBA research (2014) and Goad data (2013)

2.2.5 The high vacancy rate in the category 'Outside the boundary' are predominantly located within the Dolphin Quay retail block which has encountered difficulties in finding occupants for retail units since opening.

2.3 Diversity of uses in Poole Town Centre

2.3.1 The overall figures show that, in general, the diversity of units in Poole are comparable with the national figures. In terms of convenience retailers, the proportion in Poole is marginally lower than the national figure. Units classed as 'Grocery and Frozen foods' comprise almost 90% of the total convenience floorspace given the large units of Sainsbury's and Asda, which combined comprise almost 75% of the total convenience floorspace.

Table 1.3 Poole centre diversity of uses comparison with national average

	UK average	Poole % of units	Difference to UK average	% in terms of total floorspace in Poole
Convenience goods	8.96%	7.41%	-1.55%	20%
Comparison Goods	40.56%	41.13%	+0.75%	48%
Service retailers	36.84%	32.48%	-4.36%	21%
Miscellaneous	1.16%	1.99%	+0.83%	1%

PBA research (2014) and Goad data (2013)

2.3.2 In terms of comparison units, again Poole is very similar to the national average. Clothing shops are not only highly represented in terms of numbers of units but also in terms of floorspace representing 31% of the total comparison floorspace. This is in part due to the presence of the Dolphin centre and nearby areas which have a number of large clothing retailers. For instance, of the floorspace of the units categorised as clothing retailers, almost 78% is found towards in the 'Town Centre North' whereas 14% is located in 'Lower High Street'.

2.3.3 4% of the units on the High Street are categorised as charity shops, which is broadly in line with national levels. In terms of floorspace, 88% of the total floorspace dedicated to charity shops is located in the 'Lower High Street', with the remainder (12%) found in the 'Town

Centre North' boundary. With many charity shops centred in one section, this may have an impact on the feel and vitality of certain pockets of the town.

2.3.4 Finally, the number of service retailers appears slightly lower than the national average. Looking into this figure further, it can be seen that Poole has a higher representation in restaurants, as was identified in the previous section, however other service units such as hairdressers, estate agents and banks appear to have a slightly lower presence. Half of the floorspace categorised as service retail is found within the 'Lower High Street', and 13% found in 'Outside of the boundary' locations, partly due to the large numbers of restaurants and other similar uses around the Quay.

2.3.5 Table 1.4 summarises the proportions of floorspace of the total that is located in the three separate areas. As discussed, the 'Town Centre North' area has a comparatively high representation in comparison retailers, whereas service units are more prevalent in 'Lower High Street'. The figures for convenience are distorted by the large floorspace of Asda that gives 'Outside of the boundary'' a high proportion and Sainsbury's in the 'Town Centre North'.

Table 1.4 Poole centre diversity of uses comparison with national average

	% of floorspace located in the Town centre North	% of floorspace located in the Lower High Street	% of floorspace located Outside of the boundary
Convenience goods	39%	8%	53%
Comparison Goods	68%	22%	10%
Service retailers	37%	50%	13%

PBA research (2014) and Goad data (2013)

Tourism

2.3.6 Poole is clearly an area that caters for the tourist industry with a number of uses, particularly to the south of the town such as the Quay, which at the time of the healthcheck, appeared very popular. This being said, it does not particularly seem that Poole is completely reliant on a tourist industry like other UK coastal towns due to the large catchment of residents around Poole and neighbouring areas.

Evening economy and Leisure units

2.3.7 Leisure and evening economy units appear to be divided between two separate areas. The Lighthouse is a modern arts centre providing film, dance, comedy and dance and is situated opposite the Dolphin Centre and hosts a number of popular large events. At the opposite end of Poole, there are a number of museums and arcades, near the Quayside that offer a number of attractions. Similarly this location is where the majority of the evening economy is situated with the area well stocked with a number of bars and restaurants.

2.3.8 Other than these two locations, the High Street between the Lighthouse and the Quay is not particularly vibrant in the evenings. Although the Lighthouse is popular it is could be considered that a greater number of leisure units around this area could help support the offer in this area of the town. Its proximity to the bus centre, train station and road links means that this area would likely be a successful location in terms of access.

Evidence of street markets

2.3.9 The wide streets throughout the High Street and within Falkland Square offer the opportunity to host regular weekly and seasonal markets. This again brings some vibrancy within the town centre and attracts visitors.

Perceptions of Safety

2.3.10 Overall, Poole town centre did not appear particularly unsafe. The Quayside, where the majority of the evening economy would take place, is particularly well lit and more relaxed rather than an area where antisocial behaviour would occur. The main High Street also had adequate lighting throughout and some evidence of CCTV. Some tired, more run-down locations, particularly throughout the High Street, which is largely disused in the evening, could give the perception of unsafety.

Access

2.3.11 The retail centre is particularly well connected as Poole is easily accessible from the larger centres both within the study area and to neighbouring areas such as Bournemouth. The bus station is joined to the Dolphin Centre providing a coherent link to the main retail area. Poole is also accessible by train however although it can be considered that the train station is less well connected than the bus station.

2.3.12 Table 1.5 shows summarises information from Parkopedia regarding parking within a 10 minute walk away from the main High Street. In total it is considered that there are a large number of parking spaces available within the centre.

Table 1.5 Parking in Poole

Location	Availability	Cost (approx.)	Number of spaces (approx.)
New Orchard	Mon-Sat 8:00-18:00	£0.40 / 30 mins	19
High Street Shops - Hill Street	Mon-Sat 8:00-18:00	£0.80 / 1 hour	353
Quay Visitors	Mon-Sun 8:00-18:00	£0.80 / 1 hour	550
Prosperous Street	Mon-Sat 8:00-18:00	£0.40 / 30 mins	10
The Quay	Mon-Sun 24 hours	£10.00 / 24 hours	100
Dear Hay Lane	Mon-Sat 8:00-18:00	£0.40 / 30 mins	Unknown
Chapel Lane	Mon-Sat 8:00-18:00	£0.40 / 30 mins	Unknown
ASDA Poole Superstore - West Quay Road	Mon-Sun	£1.50 / 2.5 hours	Unknown
Shoppers - Towngate Bridge	Mon-Sun 24 hours	£0.90 / 1 hour	353

Parkopedia (2014)

3 Upper Parkstone health check

3.1 Introduction

3.1.1 The retail environment of Upper Parkstone is comprised predominantly of the long, linear Ashley Road. The majority of the units are commercial uses and, according to the Poole Retail Monitoring Report 2013, the road is approximately 1.25 miles containing over 200 retail units.

3.2 Retail Offer

3.2.1 The range of units along Ashley Road are typically to those found on many UK high streets and predominantly contain a number of service units such as launderettes, high street banks and estate agents. Although the majority of the units on the High Street are independent, local retailers as characteristic of many high streets, there are a number of national multiples present such as the Co-operative Supermarket, Superdrug and Waitrose. The latter appeared particularly popular at the time of the study. Its prominent position in the middle of the High Street (Ashley Road) is also likely to benefit other units by attracting shoppers into this area.

3.2.2 Noticeably, the High Street does not appear to have a particularly thriving evening economy. The number of restaurants appears low, with a road having comparatively more takeaways as opposed to restaurants. Also, given its size, the street has relatively few bars or pubs. In a wider sense, the town has relatively few leisure or community uses, with a library towards the eastern end of the road and a church and nursery in the middle.

3.2.3 The High Street appears to have similar problems with vacant properties as the town centre. For instance, of the eight units directly next to Waitrose (in figure 2.1, opposite St John's church) in what could be considered as a main retailing area on the street, at the time of the survey, four had letting or sale signs. Vacant properties were found in a number of locations along the High Street.

Figure 2.1 and 2.2: Upper Parkstone (Ashley Rd)

3.2.4 The most eastern part of the High Street is located adjacent to Poole Retail Park, which contains a number of large comparison retailers such as 'John Lewis at Home', 'Next Home' and 'Boots'. Despite the close proximity of the High Street to the retail park the two shopping environments do not appear particularly related and it can be assumed that the retail park may adversely attract customers from there.

3.3 State of town centre environmental quality

3.3.1 The quality of the urban environment is, on the whole, not as attractive as many other areas in the retail study. Although the High Streets appear generally quite clean, the Victorian properties that align the High Street show clear signs of degradation with many of the shop fronts appearing rather tired. The western side of the High Street is in on the whole in a poorer state than the eastern side.

Figure 2.3, 2.4 and 2.5: Upper Parkstone (Ashley Rd)

3.3.2 Although the pavements are generally wide throughout it appears that there are many areas where the pavement is rather cluttered, often with bollards to restrict parking as can be seen below in figure 2.6, 2.7 and 2.8.

Figure 2.6, 2.7 and 2.8: Upper Parkstone (Ashley Rd)

3.4 Accessibility

3.4.1 Ashley Road is located a short distance, approximately a 10 to 15 minute drive, away from Poole Town Centre. It is also a short walk away from two train stations, Parkstone station, which is closer to the west side of the High Street, and Branksome station, which is a short walk from the east of the road.

3.4.2 The road is located on a popular route that links Poole and Bournemouth. Parking is limited to along the High Street and some side streets, along with a very small car park (approx. 50 spaces) on Mansfield road. Due to the parking along the High Street, and the road being a busy link road between Poole and Bournemouth, the road appears well used throughout. The high levels of traffic along the road necessities the number of traffic lights along the road, however crossing is still sometimes difficult across some side streets.

3.4.3 This route is also popular with buses travelling between the two large town centres of Poole and Bournemouth with the main bus provider offering buses every three minutes during weekdays (at the time of writing). Given the length of the road, there are fortunately a number of stops along the road which assists less mobile High Street users.

4 Ashley Cross health check

4.1 Summary

4.1.1 Ashley Cross consists of a relatively small local centre surrounding Ashley Cross green, a very attractive open space in close proximity to Poole town centre. The retail streets are mainly comprised of Commercial Road and Station Road.


Figure 3.1 Ashley Cross (Commercial Rd) and 3.2 Ashley Cross Green

4.2 Retail Offer

4.2.1 The attractive properties around Ashley Cross, and the presence of a number of employers in the centre, means that the retail offer is slightly different. For instance, there appears to be a lower proportion of shops, in terms of both comparison and convenience retailers, and a much closer focus towards restaurants, café’s pubs and bars.

4.2.2 Its mix of deli’s, restaurant and bars provides a strong evening economy which is very popular, rivalling other areas such as the Town Centre, Tower Park and Bournemouth. Importantly, and compared to other High Street retail environments, there is a clear focus towards dining units rather than takeaways as the area and the park and pleasant streetscape help provide a very attractive setting. The proximity to a number of employers means that the area also attracts a number of customers during lunchtimes and after work.

Figure 3.3 Ashley Cross (Commercial Rd) and 3.4 Ashley Cross (Church Rd)

4.3 State of town centre environmental quality

4.3.1 Ashley Cross appears to exhibit a different retail environment than to the neighbouring areas of Poole town centre and Upper Parkstone. The retail environment is concentrated around a small public open space, in which the number of trees that align the park give the retail environment a greener feel.

4.3.2 The properties that enclose the park are of a particularly high quality many of which are Edwardian or Victorian. As can be seen in figure 3.5, 3.6 and 3.7 there are a number of buildings of architectural merit, which again contribute to a pleasant retail environment.

Figure 3.5 and 3.6 Ashley Cross (Station Rd), Figure 3.7 The Ox on Commercial Rd

4.4 Accessibility

4.4.1 Ashley Cross is in close proximity to the Town Centre, approximately a 5 minute car journey to the east of Poole Town Centre. Similar to Upper Parkstone, the retail environment is located on a popular route between Poole and Bournemouth meaning that the area is often busy and easily accessible by public transport. Given its size there appears to be a sufficient range of parking opportunities with a car park (approx. 100 spaces) and various on street parking.

4.4.2 The retail environment is quite compact and, as it encloses the park, offers an attractive route between units however, there are some units located at the most eastern points of Commercial Road, towards the centre, that are slightly segregated from the rest of the retail area.

5 Broadstone health check

5.1 Summary

5.1.1 Broadstone is a busy and active local centre some distance north of Poole town centre. The retail environment is comprised of approximately 90 units, predominantly based along the most northern section of lower Blandford Road and, to a lesser extent, Dunyeats Road.

Figure 4.1 Broadstone Town Centre, primary retail street

5.2 Retail Offer

5.2.1 The retail environment contains many of the usual retail units typical of many UK High Streets and the offer is likely to cater mainly for those living within the local area. Despite its size, the area is well represented in convenience retailers with the centre having a relatively large Budgens and a Tesco express, which combined take up a large proportion of the total floorspace. These two, Budgens in particular, appear to be the most popular stores in this centre.


Figure 4.2 and 4.3: Broadstone Town Centre, key convenience retailers

5.2.2 Additionally, the centre appeared to have a relatively high proportion of restaurant and cafes than in other locations. A few employment uses situated off the main street, along with some community units such as a library, church and physiotherapy centre means that the café's appeared quite well used throughout the daytime.

5.2.3 At the time of the study there were three properties that were either vacant, or advertised as soon to be vacant, which according to the Council's latest Retail Monitoring report (2013) is a notable improvement from last year's figure.

5.3 State of town centre environmental quality

5.3.1 Whilst some of the buildings along the High Street are not of the greatest quality, the urban realm appears quite well maintained with little evidence of litter or damage to properties. There are a number of bins, bollards and seating areas along the pavements which gives the streetscape an overly busy appearance. A number of trees and flower beds line the retail street which gives the area an attractive setting.

5.4 Accessibility

5.4.1 Access to the High Street is restricted to car and bus travel, with buses every 15 minutes from Poole town centre. The centre has a small car park available a short distance off the main High Street and also a number of spaces available along Lower Blandford Road. On-street parking means that the High Street appears particularly busy and slightly more hazardous for pedestrians. As Lower Blandford road appears to be a busy route, crossing the road is also particularly difficult at times.

6 Swanage town centre health check

6.1 Introduction

6.1.1 Swanage is a coastal town, south of Wareham and Poole, located within Swanage Bay towards the south of Purbeck District. It can also be seen that its retail environment is located in a number of areas.

6.1.2 The main retail environment can be seen as Station Road, which eventually continues into Institution road. Many of the buildings are of Edwardian style and offer a pleasant streetscape. This is also where many of the larger retail units are found and as such contains a greater number of national multiples, and includes the centres two larger convenience retailers, Co-op, at the highest point of Station road, and Budgens, located also towards the higher end of Station Road, along with some comparison and service units.


Figure 5.1 and 5.2: Swanage Town Centre, Primary Retail Area

6.1.3 Institute Road runs parallel, and in close proximity to the seaside, and the retail offer noticeably becomes increasingly focussed towards the tourist industry with a number of café's, tourist-type shops and amusements. As Institute Road reaches the High Street, many of the units here are related to leisure uses, such as restaurants and this area is where the majority of the evening economy interests are located. The Mowlem centre, a community facility which includes a theatre and cinema and also has some retail use on the ground floor, is also located in this area. Nearby are the Swanage Museum and Heritage centre, along with other leisure facilities and restaurants which act as a draw for visitors.


Figure 5.3 The Mowlem Centre and 5.4: Swanage High Street

6.1.4 The urban realm around the High Street is particularly attractive with a number of stone buildings, reminders of Swanage's origins as a key location for the quarrying and processing of Purbeck stone. The consistent use of stone in many of the units, and the leisure offer, gives the area a slightly different feel to the town centre. The Mowlem centre (pictured) appears to stand out considerably due to both its prominent position on the High Street but also due to its design being very different o the surrounding units. The majority of the buildings are of a similar height, and with much of the retail environment facing east towards the bay, creates a pleasant shopping environment.


Figure 5.5 and 5.6: Swanage High Street

6.1.5 The western section of the High Street is located slightly further from the seafront and this area has a steeper topography. The High Street continues with much of the same stone units, and again is a pleasant retail environment with a number of the units appearing to be comparison retailers.

6.1.6 Finally, Kings Road East and Commercial Lane contain small collections of retail units and are located close to this section of the High Street. In this location, the layout becomes slightly less coherent, with some units not immediately noticeable from the main High Street. This includes the Emporium shopping arcade and Commercial Road pictured below. Given their location off the High Street, and the rather tired exterior of Commercial Road, this appears to be where a number of the town's vacant properties appear to be based.


Figure 5.7 Swanage High Street (upper section) 5.8: Emporium Shopping Arcade and 5.9 Commercial Road

6.2 Vacant units

6.2.1 Vacant property does not appear to be of particular concern within Swanage, with a vacancy rate considerably lower than the national level. Additionally, it appears that in the last 12 months, the vacancy level has fallen slightly from approximately 5% to less than 4%. The introduction of WH Smith into a vacant property on Station Street also means that the proportion of total vacant floorspace has fallen considerably in the past 12 months too, and the ability to attract a large national multiple such as WH Smith into the High Street is indicative of the areas apparent vitality.

Table 2.1 Swanage vacant units comparison with national average

	UK average	Swanage % of units	Difference to UK average
Vacant units	12.49%	3.87%	-8.62%

PBA research (2014) and Goad data (2013)

6.3 Diversity of uses in Swanage town centre

6.3.1 The number of convenience retailers in Swanage is marginally over the national average. The two larger supermarkets of Co-op and Budgens comprise of 68% of the total convenience floorspace.

6.3.2 In terms of comparison goods, the provision in Swanage appears considerably over the national average. Looking closer at what types of comparison retailer are prevalent in Swanage shows that clothing retailers are actually under represented (comprising of 8.3% rather than the national average of 10.2%). This is true also in terms of floorspace as only 8.6% of the total floorspace is dedicated towards clothing retailers compared to 15% in Poole.

6.3.3 Instead, retailers categorized as ‘booksellers, arts/crafts, stationers’ are three times more prevalent in Swanage, with units described as ‘gifts, china, glass and leather goods’ five times more prevalent. This is perhaps unsurprising as such uses are often more likely to be prevalent in areas of where there is a significant tourism.

6.3.4 Conversely, service retail appears considerably lower in Swanage at almost 31% compared to almost 37%. Looking into this in more detail, the number of units classified as ‘Restaurants, café’s, fastfood and takeaways’ in Swanage town centre is higher than the national average (18% of units in Swanage compared to 16.5% nationally). In fact, these make up 18% of the total floor space in the town (comparatively Poole’s restaurant, café and fast food section makes up 11%). In contrast, Swanage has a lower representation in all other service units. Again, this is characteristic of tourist locations where the retail environment has a greater tendency to supply units catered towards visitors rather than a large community base.

Table 2.3 Swanage centre diversity of uses comparison with national average

	UK average	Swanage % of units	Difference to UK average	% in terms of total floorspace in Swanage
Convenience goods	8.96%	9.68%	+0.72%	20.0%
Comparison Goods	40.56%	54.84%	+14.28%	47.9%
Service retailers	36.84%	30.97%	-5.87%	28.3%
Miscellaneous	1.16%	0.65%	-0.51%	1.2%

PBA research (2014) and Goad data (2013)

Tourism

6.3.5 Swanage appears to have a thriving tourist industry. In general the centre has very few employment uses or businesses and therefore the majority of those using the town appeared to be either residents or tourists. Discussion with consultees revealed that although the number of town centre users increases considerably in summer months, due to tourism, the town centre is busy throughout winter months given Swanage's position as a community in its own right.

Evening economy and Leisure uses

6.3.6 As discussed in a previous section, the centre has a high proportion of the number of restaurants, particularly close to the seafront. This offer is supported by the Mowlem centre and the amusements that offer a number of uses after retailing hours. The town railway is also a popular tourist destination, and draws a number of visitors into the centre.

Perceptions of safety

6.3.7 Throughout the town there are no areas that appeared unsafe or unwelcoming. Some areas of the urban realm involve narrow, secluded streets but not particularly 'no-go' areas.

Access

6.3.8 Access to the town can be made via the A351 from the north via Wareham, from where there is an hourly bus service that connects Swanage to Poole. Alternatively, access to Poole and Bournemouth can be made in the north via the chain ferry at Studland. The town is slightly separated from other large local centres and so (with the exception of tourists) the centre would best suit local requirements. As a result, it is unlikely that a large number of residents in other areas of the study area would use the centre for regular convenience or comparison expenditure

6.3.9 Movement around Swanage is on the whole fairly straightforward, with a number of the streets having wide pavements such as along Station Road meaning that the high street is well navigable. Traffic throughout the town does not appear to be a large concern, although there are areas where crossing is a concern, such as immediately outside the railway station at the junction between Station Road and Kings Road West.

6.3.10 Car parking around the centre is predominantly located towards the edges of the centre. Parkopedia highlights the details of the following five locations that are a suitable proximity to the centre.

Table 2.4 Parking in Swanage

Location	Availability	Cost (approx.)	Number of spaces (approx.)
Residents - Recreation Ground	Mon-Sun 8:00-22:00	£0.60 / 1 hour	35
Mermond Place and Co-Op Pioneer	Mon-Sun 8:00-22:00	£1.20 / 1 hour	90
Main Beach - Victoria Avenue	Mon-Sun 24 hours	£8.00 / 24 hours	400
Swanage Pier	Mon-Sun 7:00-19:00	£8.00 / day	32

Broad Road	Mon-Sun 8:00-19:00	£8.00 / 24 hours	150

Parkopedia (2014)

7 Wareham town centre health check

7.1 Introduction

7.1.1 Wareham is an historic market town situated between Poole and Swanage. The A351 route links Wareham with Swanage and there is also the Swanage railway which is due to be linked with the mainline railway at Wareham. At Wareham, the town centre includes a retail area set out around a crossroads junction. The majority of the retail offer located mainly along parts of North Street, South Street and West Street.

Quality of Urban Realm

7.1.2 The town includes a number of significant historic features, such as the Saxon town walls which reflect Wareham's historic character. The town is situated between the River Piddle to the north and River Frome to the south. The Quay area which is located towards the southern end of South Street is an attractive location associated with public houses and restaurants and is popular with visitors.

7.1.3 The area has many historic buildings of high quality which make an important contribution to the character and quality of the town. The town hall, which dates back to the late nineteenth century, provides a pleasant focal point for the town and is visible across much of the town centre.


Figure 6.1 and 6.2 Wareham High Street

The streets are well maintained and there are very few signs of derelict properties. The urban environment also appeared relatively green, with a number of hanging baskets and planting areas throughout many of the streets and side streets.

7.2 Vacant units

7.2.1 Wareham town centre has a low rate of vacancies, when compared to the national average. In terms of the total floor space, vacant properties comprise of just under 2% of the total. As the figure is small, it is difficult to discern a pattern as to where the vacant properties are likely to be most prevalent.

Table 3.1 Wareham vacant units comparison with national average

	UK average	Wareham % of units	Difference to UK average
Vacant units	12.49%	3.5%	-8.99%

PBA research (2014) and Goad data (2013)

7.3 Diversity of uses in Wareham centre

7.3.1 The number of convenience retailers is seen as higher than the UK average. In terms of total floorspace, it comprises 23% of the total which again is a considerable amount. Much of this figure is made up of the Sainsbury's at just over 1,000 sqm and the Co-operative that makes up over 500 sq.m. Between the two larger retailers they comprise exactly two thirds of the total convenience retail floorspace as the centre also contains a number of larger bakers, butchers and delicatessen's in line with its tradition character as an historic market town.

7.3.2 The number of comparison units appears higher in Wareham than the national average. As with Swanage, Wareham town centre is under represented by clothing retailers, which make up only 3% of the total floorspace. Charity shops have a notable presence in the town (7.8%) which is almost twice the national average (4.27%). Furthermore, the charity shops take up more floorspace than any other comparison retail category in Wareham.

7.3.3 Aside from charity shops, the remainder of the comparison offer appears fairly balanced. As can be seen in the table below, the overall figures for service units are almost identical to the national figure. This is helped by a number of restaurants in the town centre, particularly towards the south of the town and The Quay.

7.3.4 Notably, in terms of floorspace, comparison goods retail makes up a much smaller proportion at Wareham (35%) when compared with Poole (48.5%) and Swanage (47.9%). In contrast, the floorspace belonging to service units is much higher. This could be seen as reflecting Wareham's position as a centre catering to a smaller community as opposed to the busier destinations of Poole and Swanage.

Table 3.2 Wareham centre diversity of uses comparison with national average

	UK average	Wareham % of units	Difference to UK average	% in terms of total floorspace in Wareham
Convenience goods	8.96%	11.11%	2.15%	23%
Comparison Goods	40.56%	46.67%	6.11%	35%
Service retailers	36.84%	37.78%	0.94%	38%
Miscellaneous	1.16%	1.11%	-0.05%	2%

PBA research (2014) and Goad data (2013)

Tourism

7.3.5 The tourism industry is prevalent in Wareham, albeit not as apparent within Swanage or perhaps even Poole. The town appears to benefit from visitors passing through the town.

Evening economy and Leisure units

7.3.6 As mentioned in a previous section, the centre appears to have a significant amount of floorspace attributed to restaurant, café's and pub units when compared with Poole and Swanage. The Quay in particular appears well used and offers an attractive riverside environment. Elsewhere, the Rex Cinema, a traditional, independent cinema in the heart of Wareham also provides opportunities for leisure use, and appears to be popular.

Perceptions of Safety

7.3.7 Wareham appears as a very safe environment and crime or antisocial behaviour did not seem to be a particular problem.

Access

7.3.8 Movement around the town centre is straightforward, in part due to the town's simplistic layout. The town centre is dominated by a busy road junction, however there are a number of formal crossing points which provide opportunities to cross the roads throughout the town.

7.3.9 As mentioned above, the town is situated on the A351, the main road connecting with Poole and Swanage. There is also a key bus route between these locations, with buses every hour. Wareham is served by a railway station with frequent trains connecting between Weymouth and London Waterloo (including Dorchester, Poole, Bournemouth and Southampton), However, the railway station is not particularly well connected with the town centre, as this lies some distance to the north of the main shopping area.

7.3.10 It appears that much of the access to Wareham is made via private car, particularly from tourists and those visiting nearby locations such as Swanage and Corfe. Although there is some parking within the town centre, the town does not appear to have an abundance of parking opportunities within the centre itself, with Parkopedia noting the following Parking opportunities:

Table 3.3 Parking in Wareham

Location	Availability	Cost (approx.)	Number of spaces (approx.)
Bonnet's Lane West	Mon-Sun	£0.70 / 1 hour	26
Bonnet's Lane East	Mon-Sun	£0.70 / 1 hour	20
Rempstone Centre - Church Street	Mon-Sun	£0.70 / 1 hour	55
Streche Road	Mon-Sun	£3.10 / max	73
Wareham Quay - South Street	Mon-Sun 24 hr	N/A	Unknown
Connegar Lane	Mon-Sun	£3.10 / day	73

Parkopedia

8 Corfe Castle local centre health check

8.1 Summary

8.1.1 Corfe Castle is a small village located adjacent to the 11th century castle situated along the A351 route between Swanage and Wareham. The remains of the castle dominate the skyline of the village below and this offers an attractive, and unique environment for those using the village centre. Many of the buildings in the village are constructed from local stone which gives the town a distinctive local character.

Figure 7.1 and 7.2 Corfe retail environment

8.1.2 Because of the attractive and historic setting, the location is particularly popular with tourists visiting the village. The range of uses within the centre reflects the clear focus towards tourism, with a number of pubs, tea rooms, hotels and other attractions such as the model village. As the centre is relatively small it is envisaged that for larger convenience or comparison requirements the residents are likely to visit larger centres of Wareham, Swanage and Poole along with perhaps centres outside the study area such as Dorchester and Weymouth. Similarly, given the size of the centre, and range of offer, it is unlikely that residents from other locations will use Corfe for their convenience and comparison spend.

8.1.3 The centre sits on the A351 that connects Swanage to Wareham and there is limited number of parking within the village centre, although several additional car parks are located around the edges of the village. Travel by bus is limited to an hourly service which connects with Poole, Swanage and Wareham.

9 Wool

9.1 Summary

9.1.1 Wool is a small settlement located towards the west of Purbeck District. The retail offer is small and caters for local requirements, having a number of units typical to village locations.

9.1.2 The retail offer is split into two clusters. The majority are found on the Dorchester Road towards the west of the settlement. The road is comprised mainly of residential units interspersed with retailers. The offer includes some convenience retailers along with a number of service retailers such as hairdressers and estate agents. The second cluster of retail units covers a smaller area including a number of smaller convenience retailers and a local pub. Again, the units are tailored to local units, and therefore it is unlikely that the area would attract shoppers from outside the immediate area.

9.1.3 That being said, the retail area is relatively easily accessed being located on the A352 between Dorchester and Wareham. Furthermore, the area is not too far away from Weymouth, another larger retail and tourist environment. The settlement is also in close proximity to the popular tourist attractions of Monkey World and the Tank Museum, and the centre could attract some tourist expenditure passing through the settlement.

Appendix A Diversity of uses

Summary of diversity of uses

		UK average	Poole			Swanage			Wareham		
			#units	% of units	difference to UK average	#units	% of units	difference to UK average	#units	% of units	difference to UK average
		Apr-14	2012	2012	2013	2013	2013	2013	2013	2013	2013
Convenience goods retailers											
G1A	Bakers	2.20%	10	2.85%	0.65%	5	3.23%	1.03%	3	3.33%	1.13%
G1B	Butchers	0.76%	0	0.00%	-0.76%	1	0.65%	-0.11%	2	2.22%	1.46%
G1C	Greengrocers & fishmongers	0.62%	1	0.28%	-0.34%	3	1.94%	1.32%	0	0.00%	-0.62%
G1D	Grocery and frozen foods	2.93%	9	2.56%	-0.37%	4	2.58%	-0.35%	4	4.44%	1.51%
G1E	Off-licences and home brew	0.50%	0	0.00%	-0.50%	1	0.65%	0.15%	0	0.00%	-0.50%
G1F	Confectioners, tobacconists, newsagents	1.94%	6	1.71%	-0.23%	1	0.65%	-1.29%	1	1.11%	-0.83%
	TOTAL	**8.96%**	**26**	**7.41%**	-1.55%	**15**	**9.68%**	0.72%	**10**	**11.11%**	2.15%
Comparison goods retailers											
G2A	Footwear & repairs	1.75%	7	1.99%	0.24%	2	1.29%	-0.46%	0	0.00%	-1.75%
G2B	Men's & boys' wear	0.98%	2	0.57%	-0.41%	1	0.65%	-0.33%	1	1.11%	0.13%
G2C	Women's, girls, children's clothing	3.51%	8	2.28%	-1.23%	6	3.87%	0.36%	0	0.00%	-3.51%
G2D	Mixed and general clothing	3.96%	21	5.98%	2.02%	4	2.58%	-1.38%	3	3.33%	-0.63%
G2E	Furniture, carpets & textiles	3.35%	2	0.57%	-2.78%	7	4.52%	1.17%	6	6.67%	3.32%
G2F	Booksellers, arts/crafts, stationers/copy bure	4.31%	15	4.27%	-0.04%	19	12.26%	7.95%	5	5.56%	1.25%
G2G	Electrical, home entertainment, telephones a	3.77%	18	5.13%	1.36%	3	1.94%	-1.83%	2	2.22%	-1.55%
G2H	DIY, hardware & household goods	2.47%	4	1.14%	-1.33%	2	1.29%	-1.18%	4	4.44%	1.97%
G2I	Gifts, china, glass and leather goods	1.67%	8	2.28%	0.61%	14	9.03%	7.36%	3	3.33%	1.66%
G2J	Cars, motorcycles & motor accessories	1.17%	3	0.85%	-0.32%	2	1.29%	0.12%	1	1.11%	-0.06%
G2K	Chemists, toiletries & opticians	3.88%	15	4.27%	0.39%	3	1.94%	-1.94%	5	5.56%	1.68%
G2L	Variety, department & catalogue showrooms	0.60%	6	1.71%	1.11%	0	0.00%	-0.60%	0	0.00%	-0.60%
G2M	Florists and gardens	0.87%	2	0.57%	-0.30%	1	0.65%	-0.22%	2	2.22%	1.35%
G2N	Sports, toys, cycles and hobbies	2.03%	14	3.99%	1.96%	7	4.52%	2.49%	2	2.22%	0.19%
G2O	Jewellers, clocks & repair	1.96%	7	1.99%	0.03%	5	3.23%	1.27%	1	1.11%	-0.85%
G2P	Charity shops, pets and other comparison	4.27%	13	3.70%	-0.57%	9	5.81%	1.54%	7	7.78%	3.51%
	TOTAL	**40.56%**	**145**	**41.31%**	0.75%	**85**	**54.84%**	14.28%	**42**	**46.67%**	6.11%
Services retailers											
G3A	Restaurants, cafes, coffee bars, fast food & ta	16.52%	62	17.66%	1.14%	28	18.06%	1.54%	13	14.44%	-2.08%
G3B	Hairdressers, beauty parlours & health centre	9.65%	20	5.70%	-3.95%	6	3.87%	-5.78%	7	7.78%	-1.87%
G3C	Laundries & drycleaners	0.91%	1	0.28%	-0.63%	1	0.65%	-0.26%	2	2.22%	1.31%
G3D	Travel agents	1.10%	4	1.14%	0.04%	1	0.65%	-0.45%	1	1.11%	0.01%
G3E	Banks & financial services (incl. accountants)	4.23%	14	3.99%	-0.24%	6	3.87%	-0.36%	4	4.44%	0.21%
G3F	Building societies	0.55%	3	0.85%	0.30%	1	0.65%	0.10%	1	1.11%	0.56%
G3G	Estate agents & auctioneers	3.87%	10	2.85%	-1.02%	5	3.23%	-0.64%	6	6.67%	2.80%
	TOTAL	**36.84%**	**114**	**32.48%**	-4.36%	**48**	**30.97%**	-5.87%	**34**	**37.78%**	0.94%
Miscellaneous and vacant units											
G4A	Employment, careers, Post Offices and inforn	**1.16%**	7	1.99%	0.83%	1	0.65%	-0.51%	1	1.11%	-0.05%
G4B	Vacant units (all categories)	**12.49%**	59	16.81%	4.32%	6	3.87%	-8.62%	3	3.33%	-9.16%
	TOTAL	**100.00%**	**351**	**100.00%**		**155**	**100.00%**		**90**	**100.00%**	