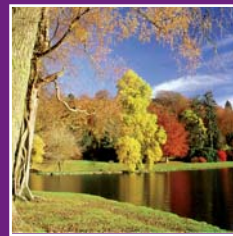


Topic Paper 10



Tourism, leisure and night time economy



LDF Topic Paper - Tourism, Commercial Leisure, the Night Time Economy and licensing

Executive Summary

National context

Government guidance for planning for tourism is contained within a Good Practice Guide (GPG). This recognises that tourism generates significant revenues, jobs and supports communities through enhancing local services and facilities such as shops and pubs particularly in rural areas. Tourism can also support a broader and more vibrant and active community by attracting arts, sports or cultural events, aid rural diversification and underpin the quality of the local environment.

It advises us that the core strategy should cover tourism where it is a key issue; we think tourism is important to the district and should be addressed.

QUESTION

Is tourism important enough to be addressed within the core strategy?

Planning Policy Statement 6 - Planning for Town Centres, identifies the main town centres uses associated with leisure and tourism as arts, culture, tourism, leisure, entertainment facilities, more intensive sport and recreation uses including cinemas, restaurants, drive-through restaurants, bars and pub, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls. It identifies that a diversity of uses in the centres makes an important contribution to a centres vitality and viability and that different but complementary uses in the day and during the evening support each other making town centres more attractive to local residents, shoppers and visitors. As such it requires us to prepare planning policies to help manage the evening and night-time economy in appropriate centres and provide for a range of leisure, cultural and tourism activities whilst also complementing the statement of licensing policy. Any such development should also be located in Town centre.

Planning Policy Statement 7 - Sustainable Development in Rural Areas, recognises that leisure and tourism activities are also important to rural areas and that we should support any tourism or leisure development that benefits rural businesses, communities and visitors so long as they do not harm the character of the countryside especially in statutorily designated areas. This includes the provision of essential facilities for tourist visitors however these should be in appropriate locations where identified need is not being met, where possible this should be in existing or replacement buildings, however extensions could be allowed where the scale is appropriate to the locations.

PPS7 also looks specifically at tourist accommodation in rural areas. This requires new buildings to be in or adjacent to existing towns and villages, and suggests that a positive approach should be taken to extensions to existing accommodation subject to scale being appropriate to its locations. For any policies regarding static holiday, touring caravan parks or holiday chalet developments policies should carefully weigh the objective of providing adequate facilities and the need to protect landscapes and the environment and develop policies regarding the provision of such facilities.

Regional context – the draft Regional Spatial Strategy (RSS) for the South West identifies that new tourist development should be encouraged to improve quality, and attract additional visitors based on realistic measure of demand in the most accessible locations including small scale schemes in rural areas, which can assist the diversification of the economy. New developments should add value to the tourism offer. At strategic tourist destinations local authorities and stakeholders should collaborate to define the future role of tourism in the local economy, including measures required to support it and the need to allocate sites. Major new high quality, high profile attractions should be within or close to Strategically Significant Cities and Towns (SSCTs) where they will enhance the overall quality of the tourism offer.

The RSS also requires SSCT's to promote social cohesion and healthy and secure living conditions through access to and provision of good social and community facilities and services. This includes

providing good night time facilities, which should reduce the number of people choosing to visit other areas. The RSS requires local authorities to redress existing imbalances in the provision of facilities and services, to improve a centre's 'offer' relative to its role and function and help to bring forward more sustainable patterns of use.

In some parts of the region there is concern about the loss of high quality accommodation stock to other uses. Where this is the case the RSS identifies that local authorities should undertake assessment of need, supply and demand to establish an evidence base from which positive policies can be developed to protect accommodation where necessary and to establish a sequential approach to redevelopment / re use of redundant accommodation, securing the most appropriate re-use within the local context.

Local context

Tourism

Salisbury district is a predominantly rural area of exquisite beauty, with traditional country towns and villages, each with their own character and charm. There are wonderful river valleys, winding country lanes, thatched cottages and magnificent views at every turn that can be used to promote walking, cycling, food trails and other countryside activities. At the core of the district we have one of the world's most famous and recognisable monuments, Stonehenge, and arguably England's finest medieval cathedral, Salisbury. Other attractions include magnificent country houses, museums, gardens, farms and animal attractions and a number of outstanding National Trust properties include Stourhead and Mompesson House. The environment is a key part of the tourism product and the future success of the tourism industry is, in many ways, dependent on the long-term survival of the environment.

Just outside of south Wiltshire borders are the New Forest National Park, Beaulieu Motor Museum, Longleat House and Safari Park and a number of smaller but equally important attractions such as Breamore house and Museum and the Museum of Army Flying. The popular resort of Bournemouth and cities of Southampton and Portsmouth are also within easy reach. Salisbury therefore offers a wealth of opportunities for tourists.

Tourism is an important contributor to the local economy; direct spending in south Wiltshire in 2003 for example was just over £146 million from day and staying visitors from both home and abroad. A residents survey carried out in 2004 showed that 88% of local people considered tourism to be good for Salisbury. Heritage attractions account for 50% of the total available in south Wiltshire and Salisbury is primarily a short-break destination with the average length of stay being 3.99 nights.

Therefore the council feel that tourism is a key issue for Salisbury district and should be covered in the core strategy.

The vision within the council's tourism strategy is for Salisbury and south Wiltshire to be recognised as a premier UK tourism destination. However to achieve this improvements in tourism and leisure infrastructure need to occur. A study undertaken by Bournemouth University in 2005 evaluated the accommodation and conference sector in the district and concluded that there is a lack of supply in the budget and high quality leisure accommodation sector relative to demand. The study also identified that Salisbury is less successful in attracting business visitors than comparable destinations and that it does not have the conference infrastructure needed for large events.

As such the tourism strategy identifies the need to provide at least 100 x 4 star beds spaces, at least one boutique hotel, at least one 100 bed hotel to serve the group market as well as increasing the number of B&B and self-catering bed spaces. Furthermore a professional, high quality, flexible conference facility capable of attracting medium to large conferences should be provided.

With respect to hotel facilities, it has also been noticed that some hotels are easily able to get planning permission for change of use away from tourist provision for example to residential and this is further diminishing the bedspace in Salisbury.

QUESTIONS

- Is tourism important enough to be addressed within the core strategy?

- Should the council provide for at least one 100 bed 4 star hotel in Salisbury?
- Should the council provide for a boutique hotel in Salisbury?
- Should the council provide for 100 bed group / budget hotel?
- Should the council introduce a planning policy to provide for a high quality, flexible conference facility capable of attracting medium to large conferences?
- Should the council develop a policy to prevent the loss of hotel bed spaces in Salisbury including B&B's and guesthouses?
- Should the council develop a policy to ensure the sustainable location of tourist accommodation in the countryside?
- Should the council provide a policy for proposals for static and tourist caravan sites and holiday chalet developments even though no need has been identified?
- Should the council continue to maintain a policy supporting a visitor centre for Stonehenge.

Leisure and the Night-Time economy

Salisbury city boasts a modern leisure centre, arts centre, theatre, multi screen cinema, and a purpose built entertainment venue (City Hall). It is home to the long established Salisbury International Arts Festival and the new Salisbury food and Drink Festival. The city is famous for its pubs, many of which have a long and interesting history, and together with a diverse range of restaurants they provide visitors with a wealth of eating and drinking opportunities. However, a study carried out in 2005 by Bournemouth University found that visitors to Salisbury felt that Salisbury does not provide alot of leisure facilities or attractions such as cinemas. 74% of visitors woud like a greater range of restaurants and other places to eat.

The Leisure and Retail Needs survey undertaken by GVA Grimley in 2006 looks into the provision of leisure facilities and the night-time economy in the district. This confirms that there is a weak role of evening leisure provision compared to the daytime visitor and this is likely to be a consequence of the relatively limited range of evening economy activities. Furthermore although there is a good selection of traditional public houses and chain bars throughout the city centre, the selection of quality wine-bars, pubs/bars and restaurants is relatively limited for a centre of the size of Salisbury.

The study undetook capacity projection with regard to leisure floorspace needed to 2021. It advises that with the growing trend towards mixed use town centre schemes, it is usual to assume that town centre comparison goods retail schemes will comprise around 15% of leisure floorspace. On this basis the following potetial capacity for additional leisure floorspace has been identified (A3 restaurants and cafes / A4 drinking establishments and A5 hot food takeaways):

Area	2011 (sq m net)	2016 (sq m net)	2021 (sq m net)
Capacity for comparison goods floorspace in the District	9,181	22,488	38,115
Capacity for A3/A4 Leisure floorspace in the District based on 15% additional to Comparison goods Capacity	1,620	3,966	6,726

These figures do not include commercial leisure facilities such as cinemas. An increased mix could be achieved through policies using the City Centre boundary and primary shopping frontages through encouraging missed use retail / leisure schemes whilst protecting A1 shop uses especially in the primary frontage in effect using the 2006 Use Class Order although this would be need to be addressed within the Salisbury and Wilton Area Action Plan.

Cinema provision in Salisbury is considered to be relatively small compared to the 10-12 screens required in new developments aid it is evdient that people are travelling elsewhere to the cinema. It is therefore considered that there is capacity for an additional 5-7 cinema screens and other commerical leisure facilities if the market demand is there. This could be through a new development or an extension to the existing cinema in accordance with PPS6. It should be noted that any new development shoud not be considered in isolation from the rest of the city centre. Linkages and integration of different sites and schemes shoud underpine the future of the city. The council could

consider allocating an appropriate site for leisure based development or quarter particularly if Salisbury is to maintain its role as a higher order centre and if it is to compete effectively with other centers of the sub-region.

QUESTIONS?

- Should the council provide for an increase in leisure facilities (restaurants, pubs bars, cinemas etc) in order to encourage more people to come to Salisbury in the evening rather than going to other centres?
- What kind of leisure activities should be encouraged?
- In more rural areas should the council support any tourism or leisure development that benefits rural businesses, communities and visitors so long a they do not harm the character of the countryside especially in statutorily designated areas?

LDF Topic Paper - Tourism, Commercial Leisure, the Night Time Economy and licensing

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Introduction

The Government's key objective for town centres is to promote their vitality and viability by enhancing existing centres and encouraging a wide range of services in a good environment. This includes the promotion of the night-time economy, as it makes a vital contribution to city and town centres

Tourism, Commercial Leisure and the Night Time Economy can include the following:

- Hotel, guest house and bed & breakfast accommodation;
- Cinemas, theatres and concert and bingo clubs;
- Museums, galleries and conference facilities;
- Restaurants, bars, pubs, casinos and night clubs; and
- Indoor and ten-pin bowling and health & fitness centres.

Tourism

Tourism is defined by the World Tourism Organisation (WTO) as comprising the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes. The WTO further explains that "Tourism" refers to all activities of visitors including both "tourists (overnight visitors)" and "same-day visitors". The Government has adopted this definition and the WTO definition of tourism should therefore be used for the purposes of the LDF. However it is also acknowledged that the tourist industry often describes a 'disparate collection of businesses that all, to one degree or another, rely on tourism for their income and long-term survival' (A Tourism Strategy for South Wiltshire, p14)).

At the same time, the Government's good practice guide recognises that tourism is extremely diverse. This definition can include travel and visits for business, professional and domestic purposes as well as for holidays and recreation. But those distinctions are not always clear-cut; sometimes more than one purpose is involved. For example, business conferences and sales events, music festivals, professional and academic meetings, all of which can attract both national and international audiences, often combine an element of tourism with their more specific purposes. Such events are an important and expanding aspect of the tourist industry. Tourism includes not only the annual family holiday but also a wide range of shorter visits, weekend breaks and day trips. It is essential that we recognise this diversity when preparing development plans and in taking planning decisions. There is clearly a link between tourism and leisure and therefore they should be considered together.

Salisbury district is a predominantly rural area of exquisite beauty, with traditional country towns and villages, each with their own character and charm. There are wonderful river valleys, winding country lanes, thatched cottages and magnificent views at every turn. At the core of the district we have one of the world's most famous and recognisable monuments, Stonehenge, and arguably England's finest medieval cathedral, Salisbury.

Other attractions include magnificent country houses, museums, gardens, farms and animal attractions and a number of outstanding National Trust properties include Stourhead and Mompesson House.

Just outside of south Wiltshire borders are the New Forest National Park, Beaulieu Motor Museum, Longleat Safari Park and a number of smaller but equally important attractions such as Breamore house and Museum and the Museum of Army Flying. The popular resort of Bournemouth and cities of Southampton and Portsmouth are also within easy reach.

Tourism is an essential part of the south Wiltshire economy. Direct spending in south Wiltshire in 2003 was just over £146 million, from a day visitors and staying visitors from the UK and overseas. The local tourism industry sustains some 4,339 jobs or 8% of the total local employment. Most importantly more than half of all tourism day visit spend (£45 million) is spent in the countryside, helping the rural businesses in our market towns and villages. (Data source: A tourism strategy for south Wiltshire)

In 2003 staying visitors in south Wiltshire made some 392,000 trips, stayed for 1.3 million nights and spent more than £60 million. Salisbury and south Wiltshire is the sixth most popular day visit destination in the South West. Total direct spending in south Wiltshire in 2003 was just over £146

million and total day visits of 3,357,000 were made to south Wiltshire. (Data source: A tourism strategy for south Wiltshire)

Commercial leisure

In the commercial leisure sector, changing social and demographic trends and increased personal disposable income will fuel sustained growth in mainstream commercial leisure activities, including cinemas, bars, restaurants and post deregulation, significant additional investment in the gambling and entertainment industry. As a consequence of market trends and policy, many mainstream leisure activities, including the cinema, are increasingly returning to traditional town centre locations.

Leisure spending growth is continuing to outstrip that of retail. Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors.

Night time economy

The night-time economy of an area can make an important and vital contribution to the economy of an area. A range of activity in a city or town increases viability and vitality and can contribute to the creation of inclusive communities. The night-time economy creates jobs, attracts people to an area and brings money in.

The night-time economy is associated with many negative factors including noise, violence, litter, safety issues and drunken behaviour. It must therefore be ensured that any development proposals address these issues and how they can be tackled over the long term. Such basic solutions as running public transport later at night to take people home quickly, rather than have them hanging around the centre, is a simple but effective way of reducing some of the negative behaviour and incidents which are associated with the night time economy. Good design is therefore required to design out crime and provide a more inclusive place for people to meet and socialise.

1. ISSUES FACING SALISBURY DISTRICT – Local evidence base

A tourism Strategy for South Wiltshire

The tourism strategy has been underpinned by the following local evidence base:

Economic impact of tourism in Salisbury - South West Tourism (2003)
Salisbury destination benchmarking victory survey - Tourism South East (2004)
Accommodation facilities in Salisbury - Infrastructure evaluation Bournemouth University (2005)
Leisure facilities in Salisbury – Infrastructure evaluation - Bournemouth University (2005)
South Wiltshire economic assessment - Salisbury District Council (2005)
South Wiltshire tourism SWOT analysis - Salisbury District Council (2005)
Towards 2015 - Shaping tomorrow's tourism - South West Tourism (2005)

All of the above documents can be found at the following web location:

<http://www.salisbury.gov.uk/leisure/tourism/tourism-strategy.htm>

The vision within the tourism strategy is:

- For Salisbury and South Wiltshire to be recognised as a premier UK tourism destination
- To develop and promote the local tourism industry in a sustainable way that takes full advantage of the natural and cultural assets and of our heritage, that visitors are provided with a quality experience which makes the want to return and recommend south Wiltshire to others
- For the benefits of tourism to be enjoyed by everyone in south Wiltshire

Key principles of the strategy are to:

- Be market led, to be aware of changing demands and evolving lifestyle patterns and of increased competition from overseas and the UK
- To ensure the expectations of visitors are exceeded
- To ensure that all tourism development is sustainable
- To make sure that the social, cultural and economic benefits of tourism are spread as widely throughout the local community as possible

In the South West the environment is a key part of the tourism product and the future success of the tourism industry is, in many ways, dependent on the long-term survival of the environment. All parts of the tourism industry should work in harmony with the natural environment and to ensure that we do not damage or destroy the very thing people come to south Wiltshire to enjoy.

The concern for the environment provides an opportunity to develop an alternative 'green tourism' product based around activities such as walking and cycling and Salisbury should be promoted as a car-free accessible destination.

The tourism strategy recognises that tourism can have a negative impact on local communities. Traffic congestion, crowded shops, increased levels of litter and a high number of holiday homes are just some of the detrimental side effects.

There is a high degree of seasonality in Tourism, however city destinations such as Salisbury are less susceptible to the seasonal effect, particularly with the growth in short-break holidays, but it still occurs to a certain degree. Business tourism can help to lessen the impact of seasonality in the leisure holiday market on accommodation providers. The strategy aims to encourage more businesses to remain open all year. The development of niche markets, such as walking, heritage and activity breaks will be important to help make Salisbury district an all year round destination.

Tourism is generally considered to be beneficial. A residents survey carried out in 2004 showed that 88% of local people considered tourism to be good for Salisbury. There are 20 major visitor attractions in south Wiltshire, of which 7 are located in Salisbury City.

Heritage attractions account for 50% of the total available in south Wiltshire. Salisbury is primarily a short-break destination with the average length of stay being 3.99 nights.

Accommodation

South Wiltshire has a wide range of accommodation from campsites to hotels but the sector is dominated by serviced accommodation. Much of the accommodation is concentrated in Salisbury but the more rural areas are also well provided for particularly with bed and breakfast establishments.

Accommodation wise there are just over 2,700 serviced accommodation bed spaces and 82 self catering units (317 bedspaces). Hostels provide a further 87 bedspaces. Five camping and caravan sites provide around 405 pitches.

An infrastructure evaluation of the accommodation and conference sector in south Wiltshire was carried out by Bournemouth University in 2005. This concluded that there was evidence to suggest a lack of supply in the budget and high quality leisure accommodation market relative to demand. Salisbury is also less successful in attracting business visitors than comparable destinations and that it does not have the conference infrastructure needed for large events.

Leisure

Salisbury city boasts a modern leisure centre, arts centre, theatre (Salisbury Playhouse), multi screen cinema and a purpose built entertainment venue. It is also home to the long-established annual Salisbury International Arts Festival and the new Salisbury Food and Drink Festival. The city is famous for its pubs, many of which have a long and interesting history, and together with the city's diverse range of restaurants, they provide visitors with a wealth of eating and drinking opportunities. However, a study carried out in 2005 by Bournemouth University found that visitors to Salisbury felt that Salisbury City itself does not provide a lot of leisure facilities or attractions such as cinemas. 74% of visitors would like a greater range of restaurants and other places to eat.

The tourism strategy contains an action plan which suggests the need to:

- To improve the quality of hotel accommodation – at least 100 x 4 star bed spaces, at least one high quality boutique hotel
- To increase the number of hotel bedspaces – at least one 100 bed hotel to serve the group market
- To increase the number of B&B bedspaces
- To ensure that there is a supply of good quality low-cost accommodation
- To increase the number of self-catering bedspaces in Salisbury City
- To develop and improve the existing stock of visitor attractions
- To ensure a new visitor centre is provided for Stonehenge with much improved facilities for visitors, including a Tourist Information Centre
- Improve the number, variety and quality of restaurants and other eating places
- To have a professional high quality, flexible conference facility capable of attracting medium to large conferences.
- To develop the districts rural product through the greater promotion of walking, cycling, food trails and other countryside related activities

<http://www.salisbury.gov.uk/leisure/tourism/tourism-strategy.htm>

Salisbury District Council Retail and Leisure Needs Study 2006 – GVA Grimley (Leisure and the night time economy)

Background / general situation

In the commercial leisure sector, changing social and demographic trends and increased personal disposable income will fuel sustained growth in mainstream commercial leisure activities, including cinemas, bars, restaurants and post deregulation, significant additional investment in the gambling and entertainment industry. As a consequence of market trends and policy, many mainstream leisure activities, including the cinema, are increasingly returning to traditional town centre locations.

Leisure spending growth is continuing to outstrip that of retail. Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore

important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors.

A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable; town centres can offer consumers a much more vibrant atmosphere in which to eat and drink; and they also offer a much wider choice of leisure venues, allowing more spontaneous decision. For bars, restaurants and health and fitness clubs, the attraction of the town centre is 'daytime trade' and the ability to capitalise on proximity to businesses and shoppers.

Culture is a wide ranging term which brings together a range of interests and activities enjoyed by people including sports, media, entertainment, the arts, museums, libraries and tourism. Culture also encompasses the built heritage, parks and countryside. Overall, it is described as allowing people to celebrate local distinctiveness and traditions – the values that make a community what it is. Participation in arts and cultural activities have remained high against a backdrop of increased competition from other leisure activities.

Salisbury city centre has a good mix of leisure activities including a cinema, night club, bingo hall, health and fitness club and theatre. In terms of major commercial leisure facilities, Salisbury has a five-screen Odeon cinema, the Chapel night-club, a Gala Bingo hall, the Playhouse Theatre, and an LA Fitness health and fitness club. There is a good selection of traditional public houses and chain bars throughout the city centre, although the selection of quality wine-bars, pubs/bars and restaurants is relatively limited for a centre of this size and position in the retail hierarchy. Chicago Rock Café, the Hogshead (now Slug and Lettuce) and the Kings Head on Bridge Street are larger format pub destinations, but these reflect the lack of quality evening destinations for a wider cross section of the catchment population.

Customer views and behaviour have been analysed through the Household Telephone Survey and In-Centre Survey undertaken as part of the Retail and Leisure Needs Assessment (Appendix 8 and 9). In terms of leisure facilities, 41% of those surveyed never visit Salisbury city centre, 11% visit once a month, 10% visit once every 1-6 months and only 12% visit once a week. These figures reflect the weak role of evening leisure provision compared to the daytime visitor and shopping role. It is clear from analysis that the majority of respondents from the telephone and in-centre surveys do not visit Salisbury City Centre in the evening for leisure uses. This is likely to be a consequence of the relatively limited range of evening economy activities. Evidence suggests that a strong town centre leisure economy increases trip time and the overall attractiveness of a town centre. The convenience of a strong mix of town centre uses also increases trip frequency. Consider that there is capacity for an additional 5-7 cinema screens, and other commercial leisure facilities if the market demand is there. Policy should aim to ensure flexibility through encouraging mixed-use retail /leisure schemes whilst protection A1 shop uses in Primary Shopping frontages.

The weakness of the evening economy is further highlighted through the Household Telephone Survey where, it is clear from analysis that Salisbury is not fulfilling a strong evening economy/leisure role. In the Household Telephone survey 66% of respondents never visit Salisbury in the evening, and in Zone 1, the Zone in which Salisbury is located, 29% never visit Salisbury in the evening, and in Zone 2, 46% had the same response.

When asked which town centre do you visit more often for pubs/night-clubs, less than 10% stated Salisbury city centre, although the response rate in Zone 1 and 2 was higher (63% and 21% respectively). For restaurants, 15% of respondents visit Salisbury, but again the response rate is higher in the central zones (Zone 1: 76% / Zone 2: 42%). It is clear, however, that Salisbury is not a first choice evening economy destination for a large proportion of the catchment population.

Leisure Goods Expenditure Projections

The Experian E-marketer Report calculates annual consumer leisure expenditure per person on leisure and recreation goods and services (2004 price base), based upon the demographic profile of the catchment area. Leisure expenditure as defined by Experian includes recreation and sporting services, cultural services, games of chance and bars/restaurants.

GVA Grimley projected available expenditure per capita up to 2021, based on the population projections from the study area, and assume an ultra long term growth rate in available expenditure of 2% per annum for leisure goods. This ultra long-term growth rate figure is derived from Experian Business Solutions.

Per Capital Leisure Goods Expenditure Adjustments – Total Study Area			
2006 (£)	2001 (£)	2016 (£)	2021 (£)
1,593	1,757	1,940	2,141

Source: Experian Business Solutions, Emarketer, 2006

The annual consumer expenditure per person on leisure goods, in the catchment is currently £1,592 (2004 prices) based on an average across the study area. Per capita expenditure on these goods will grow to £2,142 by 2021 (Table 8.3). At present (2006) per capita spending on leisure goods in the study area is approximately 7% below the national average.

If we apply the per capita goods expenditure to the total population of the catchment area it highlights that there is currently over £894.6 million of available leisure expenditure in the catchment area. This is expected to rise to just over £1,359 million by 2021 (Table 8.4).

Total Leisure Expenditure catchment area			
2006 (£000)	2001 (£000)	2016 (£000)	2021 (£000)
894,590	1,019,650	1,162,050	1,358,920

Source: Experian Business Solutions, Emarketer, 2006

The demand for additional quality leisure facilities will naturally grow as the population increases, and within the catchment area the current network of centres, for example Salisbury, should remain the main policy focus for leisure growth.

Restaurant/Café Expenditure

According to Experian Business Solutions (2004), the average person, in the catchment area, spends £926 per annum in restaurants/cafes. Experian also estimate that people's average likely spend on leisure goods such as eating out increases by 2% each annum. Currently the total spend available for restaurant/cafés in the study area is £520.4m, increasing to £790.5m in 2021, as identified in Table 8.5.

This does not justify a more flexible policy approach in Primary Shopping Frontages, and A1 shop uses should continue to be protected to underpin the vitality and viability of the town centres. It may be appropriate to allow a more flexible policy approach elsewhere in the Primary Shopping Areas and town centre boundaries, enabling the representation of A3 and A4 uses which can enhance the vitality and viability of a centre and encourage longer trip times. The tighter control of A5 (hot food take-away) uses may be appropriate. On this basis, our assessment highlights sufficient growth in the study area to sustain a circa 52% growth in this sector by 2021.

Restaurant / Café Expenditure Forecasts – Total Study Area			
2006 (£000)	2001 (£000)	2016 (£000)	2021 (£000)
520,375	593,129	675,962	790,480

Source: Experian Business Solutions, Emarketer, 2006

Leisure Floorspace Capacity

Given best practice towards vital and viable town centres, and the growing trend towards mixed use town centre schemes. It is usual to assume that town centre comparison goods retail schemes will comprise circa 15% of leisure floorspace. On this basis, Table 8.6 indicates the potential capacity for additional leisure floorspace (Use Class A3/A4/A5) in the District over the forthcoming LDF period. The calculation is based on the capacity for additional comparison goods floorspace in the District in the baseline position.

Leisure Floorspace Capacity (sq m net)			
Area	2011 (Sq m net)	2016 (Sq m net)	2021 (Sq m net)
Capacity for comparison goods floorspace in the District	9,181	22,488	38,115
Capacity for A3/A4 Leisure Floorspace in the District based on 15% additional to Comparison Goods Capacity	1,620	3,968	6,726

Clearly the profile of the catchment population, in terms of socio-demographic composition, will determine the location, scale and quality of restaurants/café in the catchment area. There is strong growth in overall leisure expenditure, and the capacity for town centre schemes supports the argument for more leisure floorspace to meet the need resulting from a growth in expenditure over the LDF period. These figures outlined in Table 8.6 do not include commercial leisure facilities such as cinemas, and only indicate capacity for restaurants, bars and cafes and other similar leisure uses falling within Use Class A3/A4 and A5. The range of Use Class A can be restricted through conditions.

Cinema provision

Salisbury has a 5-screen cinema, which is relatively small compared to 10-12 screen cinemas required in new developments. It is evident from the results of the household telephone survey that a number of people from the central zones are traveling elsewhere to competing cinema provision. For example, 9% from Zone 2 are traveling to Basingstoke; 32% from Zone 3 are traveling to Yeovil; 65% from Zone 7 are traveling to Basingstoke; 23% from Zone 8 are traveling to Southampton and 37% from Zone 9 are traveling to Poole.

On this basis we consider that the District could support additional cinema screens, perhaps through new development or an extension to the existing Odeon – subject to the constraints of the built environment. In accordance with PPS6, any proposals for leisure development should comply with the sequential test and other key requirements.

Recommendations

Salisbury should be promoted as the main focus for the retail and leisure activity over the forthcoming LDF period. New development on specific sites should not, however, be considered in isolation from the rest of the city centre. Linkages and integration of different sites and schemes should underpin the future of the city centre, and one option to achieve this comprehensive approach is an Area Action Plan.

The council should therefore consider allocating an appropriate site for leisure-based development. At present the Odeon cinema and Gala bingo Hall occupy tight spaces with consequently compromise the quality of the offer they provide. They are also sites that would be entirely appropriate for retail uses, and if redevelopment did come forward it would help enhance retail provision in the city centre.

The viability of a leisure quarter should be given further detailed consideration by the Council, particularly if Salisbury is to maintain its role as a higher order centre and if it is to compete effectively with the other centres in the sub-region.

However, the analysis also revealed a weak usage of the centre in the evenings and found that there is a lack of quality evening destinations for a wider cross section of the catchment population. The study found that the majority of respondents do not visit Salisbury City centre in the evening for leisure use and it is considered that this is likely to be a consequence of the relatively limited range of evening economy activities. The report considers that there is capacity for an additional 5-7 screens and other commercial leisure facilities.

It recommends that policy should aim to ensure flexibility through encouraging mixed-use retail/leisure schemes whilst protecting A1 shop uses in Primary Shopping Frontages.

Use Class Order (April 2006)

Changes to the Use Classes Order (UCO) took effect on 21st April 2005, enabling local authorities to have more control to manage town centre development while minimising the proliferation of pubs, takeaways and night-clubs. Cafes and restaurants have retained their Class A3 classification, pubs and bars have been reclassified under a new Class A4, and takeaways have been reclassified under a new and separate Class A5. Night-clubs have been reclassified as Sui Generis.

<http://www.opsi.gov.uk/SI/si2006/20060220.htm>

2. THE NATIONAL AND REGIONAL POLICY FRAMEWORK

DCLG (2006) Good practice guide on Planning for tourism

The GPG defines tourism as

'comprising the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes' (WTO)

The WTO further explains that "Tourism" refers to all activities of visitors including both "tourists (overnight visitors)" and "same-day visitors". The Government has adopted this definition and the WTO definition of tourism should therefore be used for the purposes of the LDF.

It recognises that tourism generates significant revenues, jobs and supports communities and helps to maintain and improve important national assets. Most tourism employment is located in small and medium sized enterprises (SME'S).

Identifies that tourism can:

- Be the focus of regeneration
- Provide a catalyst for growth
- Provide opportunities for retaining for the resident workforce and help to diversify over-specialised economies
- Help maintain and expand underused sports and recreation facilities in urban areas

Acknowledges that revenue generated by tourism can support and enhance local services and facilities such as shops and pubs particularly in rural areas, secure the retention or upgrading of public services such as public transport, health centres and libraries, support a broader and more vibrant and active community by attracting arts, sports or cultural events, aid diversification within the rural economy and underpin the quality of the local environment.

The GPG takes a pro-active role in facilitating and promoting the implementation of good quality development to ensure that the tourism industry can develop and thrive, but ensuring these are achieved in the most sustainable manner.

The core strategy should cover tourism where tourism is a key issue together with other objectives key to tourism.

Consider whether any tourist policies are needed beyond the core strategy. Any tourist site allocations should follow from the objectives set out in the core strategy.

Approach will need to be based upon a robust understanding of the characteristics of and trends within the tourism industry based on similar issues as set out in the RSS.

Specific tourism policies should:

- Maximise the benefits of tourism
- Identify optimal locations
- Integrate development with its surrounding in terms of both design, layout and function
- Avoid adverse impacts

The following important factors will need to be understood:

- Market demand
- Environmental impact
- Transport and accessibility
- Functional links
- Regeneration benefits
- Labour supply

The GPG further acknowledges that tourists visit different areas for different reasons and to enjoy different experiences. The built infrastructure required for tourism will therefore vary from area to area. Different approaches may be needed in urban and rural areas.

The GPG suggests the following tourist and leisure activities lend themselves to urban locations: hotel, guest house and bed & breakfast accommodation, cinemas, theatres, and concert and bingo halls, museums, galleries and conference facilities, restaurants, bars, pubs, casinos and night clubs and indoor and ten-pin bowling and health and fitness centres.

Requires LPAs to assess the need for these facilities and to allocate an appropriate range of sites that provide choice.

<http://www.communities.gov.uk/index.asp?id=1500045>

Planning Policy Statement 1: Delivering Sustainable Development

Requires local authorities to ensure that suitable locations are available for tourism and leisure developments economy can prosper.

<http://www.communities.gov.uk/index.asp?id=1143805>

Planning Policy Statement 6: Planning for Town Centres

The central objective of the guidance is to promote the vitality and viability of town centres by planning for growth of existing centres and enhancing existing centres by promoting them as the focus of new development.

Government objective is to:

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; and to support an efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity.

PPS6 identifies the main town centre uses associated with this topic paper as:

- Arts, culture and tourism (theatres, museums, galleries and concert halls, hotels, and conference facilities)
- Leisure, entertainment facilities, and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls);

Local planning authorities should encourage diversification of uses in the town centre as a whole, and ensure that tourism, leisure and cultural activities, which appeal to a wide range of age and social groups, are dispersed throughout the centre.

PPS6 identifies that a diversity of uses in centres makes an important contribution to their vitality and viability. Different but complementary uses, during the day and in the evening, can reinforce each other, making town centres more attractive to local residents, shoppers and visitors. Local planning authorities should encourage diversification of uses in the town centre as a whole, and ensure that tourism, leisure and cultural activities, which appeal to a wide range of age and social groups, are dispersed throughout the centre.

LDF needs to assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations; LDF should provide for a range of leisure and local services, which allow genuine choice to meet the needs of the whole community, particularly the needs of those living in deprived areas.

Local authorities should work closely with business, including retailers, leisure operators, developers, other stakeholders and the community when considering sites for allocation in development plan documents.

The Government is seeking to reduce the need to travel, to encourage the use of public transport, walking and cycling and reduce reliance on the private car, to facilitate multipurpose journeys and to ensure that everyone has access to a range of facilities. Good access to town centres is essential. Jobs, shopping, leisure and tourist facilities and a wide range of services should therefore be located

in town centres wherever possible and appropriate, taking full advantage of accessibility by public transport.

Managing the Evening and Night-time Economy

PPS6 requires Local planning authorities to prepare planning policies to help manage the evening and night-time economy in appropriate centres. These policies should encourage a range of complementary evening and night-time economy uses which appeal to a wide range of age and social groups, ensuring that provision is made where appropriate for a range of leisure, cultural and tourism activities such as cinemas, theatres, restaurants, public houses, bars, nightclubs and cafes.

Local authorities should ensure that there is an integrated approach to the evening and night-time economy, so that their planning policies and proposals take account of and complement their Statement of Licensing Policy and the promotion of the licensing objectives under the Licensing Act 2003.

Local authorities should consider developing a local strategy for the evening and night-time economy which, when co-ordinated with other local strategies, tackles a range of issues from anti-social behaviour and crime prevention to adequate late-night transport provision to support these activities.

PPS6 also states that in drawing up their policies and proposals, local planning authorities should consider the scale of leisure developments they wish to encourage and their likely impact including the cumulative impact on the character and function of the centre, anti-social behaviour, crime, and the amenities of nearby residents.

The ODPM has launched a *How To* programme to work with leaders and practitioners in developing solutions and tools for delivering cleaner, safer, greener public spaces and town centres. This will address a range of issues, including managing the evening and night-time economy.

<http://www.communities.gov.uk/index.asp?id=1501955>

Planning Policy Statement 7: Sustainable Development in Rural Areas

With respect to tourism and leisure in rural areas recognise through LDDs that tourism and leisure activities are vital to many rural economies. As well as sustaining many rural businesses, these industries are a significant source of employment and help to support the prosperity of country towns and villages, and sustain historic country houses, local heritage and culture.

LDDs should:

- (i)** Support, through planning policies, sustainable rural tourism and leisure developments that benefit rural businesses, communities and visitors and which utilise and enrich, but do not harm, the character of the countryside, its towns, villages, buildings and other features
- (ii)** recognize that in areas statutorily designated for their landscape, nature conservation or historic qualities, there will be scope for tourist and leisure related developments, subject to appropriate control over their number, form and location to ensure the particular qualities or features that justified the designation are conserved; and
- (iii)** Ensure that any plan proposals for large-scale tourism and leisure developments in rural areas have been subject to close assessment to weigh-up their advantages and disadvantages to the locality in terms of sustainable development objectives. In particular, the policy in PPG13 should be followed in such cases where high volumes of traffic may be generated.

Tourist and visitor facilities

The provision of essential facilities for tourist visitors is vital for the development of the tourism industry in rural areas. Local planning authorities should:

- (i)** Plan for and support the provision of general tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres. Where new or additional facilities are required, these should normally be provided in, or close to, service centres or villages;
- (ii)** Allow appropriate facilities needed to enhance visitors' enjoyment, and/or improve the financial viability, of a particular countryside feature or attraction, providing they will not detract from the attractiveness or importance of the feature, or the surrounding countryside.

Wherever possible, tourist and visitor facilities should be housed in existing or replacement buildings, particularly where they are located outside existing settlements. Facilities requiring new buildings in the countryside may be justified where the required facilities are needed in conjunction with a particular countryside attraction; and there are no suitable existing buildings or developed sites available for re-use.

Tourist accommodation

Most tourist accommodation requiring new buildings should be located in, or adjacent to, existing towns and villages. The conversion of suitable existing rural buildings to provide hotel and other serviced accommodation should be allowed, taking into account the policies on the re-use of rural buildings in paragraphs 17 and 18 of PPS7. Similarly, planning authorities should adopt a positive approach to proposed extensions to existing tourist accommodation where the scale of the extension is appropriate to its location and where the extension may help to ensure the future viability of such businesses.

In considering planning policies and development proposals for static holiday and touring caravan parks and holiday chalet developments, planning authorities should:

- (i)** Carefully weigh the objective of providing adequate facilities and sites with the need to protect landscapes and environmentally sensitive sites, and examine the scope for relocating any existing, visually or environmentally-intrusive sites away from sensitive areas,
- (ii)** where appropriate (eg in popular holiday areas), set out policies in LDDs on the provision of new holiday and touring caravan sites and chalet developments, and on the expansion and improvement of existing sites and developments (eg to improve layouts and provide better landscaping); and
- (iii)** Ensure that new or expanded sites are not prominent in the landscape and that any visual intrusion is minimised by effective, high-quality screening.

Support the provision of other forms of self-catering holiday accommodation in rural areas where this would accord with sustainable development objectives. The re-use and conversion of existing non-residential buildings for this purpose may have added benefits, eg as a farm diversification scheme.

<http://www.communities.gov.uk/index.asp?id=1143823>

Draft Regional Spatial Strategy for the South West

Tourism and leisure

Recognises the Regional Tourism Strategy that identifies three priorities with regard to tourism that are:

- Sustainable tourism
- Increased quality; and
- Improved destination management

Truly sustainable tourism should be delivered by protecting the natural environment (the region's key asset) whilst balancing this with the needs of the visitor, community and tourism industry. In order to achieve more sustainable tourism, the region's approach is to enhance the tourism offer by investing in existing attractions and destinations, rather than investing in and promoting major new high profile (iconic) attractions.

Identifies that the tourism industry should focus on maintaining enhancing the diversity, quality and provision of accommodation stock. In some parts of the region there is concern about the loss of high quality accommodation stock to other uses. Where this is the case the RSS identifies that local authorities should undertake assessment of need, supply and demand to establish an evidence base from which positive policies can be developed to protect accommodation where necessary and to establish a sequential approach to redevelopment / re use of redundant accommodation, securing the most appropriate re-use within the local context.

New tourism development should be encouraged to improve quality, and attract additional visitors based on realistic measure of demand in the most accessible locations including small-scale schemes in more rural areas, which can assist the diversification of the economy. New developments should add value to the tourism offer.

Overall local authorities should improve the quality and diversity of existing facilities and accommodation, maintain and enhance the role of existing resorts by safeguarding existing high quality accommodation and facilities and investing in new facilities where these would be viable and of an appropriate scale, realise the potential of the region's environmental, cultural and heritage assets and identify opportunities for the development of new facilities and accommodation related to recreational cycle and footpath networks within the region.

At strategic tourism destinations, local authorities and stakeholder should collaborate to define the future role of tourism in the local economy, identify measures required to support it and develop action plans for their delivery, The plans should identify the need to allocate specific sites, the nature and mix required and the necessary infrastructure required. Major new high quality, high profile attractions should be within or close to SSCT's where they will enhance the overall quality of the tourism offer, develop new tourism markets complementary to those in established areas, be readily accessible by public transport, cycle and pedestrian networks and help to extend the tourism season and contribution to the regional economy.

The scale of investment in retail and other facilities within town centres should take full account of changing patterns of behaviour and future levels of population growth. The development of major new regional shopping facilities outside these centres will not be supported.

Night time economy

Regional policy is set out in the Draft Regional Spatial Strategy for the South West of England (RSS) (2006 - 2026). It states that distinctive environments and cultural life must be enhanced in cities and towns. It also states that Strategically Significant Cities and Towns, which includes Salisbury, should promote social cohesion and healthy and secure living conditions through access to, and provision of, good social and community facilities and services. This includes providing good night time facilities, which will reduce the number of people choosing to visit other areas. It must however, be ensured that any provision of facilities does not increase the dependence on the private car.

Section 8.4 of the RSS deals with Town centres and paragraph 8.4.3 states that 'The centres of the regions cities and towns usually contain a number of cultural assets, facilities and services which add significantly to the quality of life of residents and visitors. The asset base, along with key public services, is of fundamental importance to current and future residents in attracting them to consider urban living.'

Paragraph 8.4.12 in the RSS states that Local Authorities '...should seek to redress existing imbalances in the provision of facilities and services, to improve a centre's 'offer' relative to its role and function and help to bring forward more sustainable patterns of use.'

Paragraph 8.4.13 in the RSS states that 'Local and Strategic Authorities will need to keep an up-to-date and robust evidence base and, in line with review of LDFs, they should undertake regular locally-based assessments once at least every three years to establish appropriate needs'.

Policy TC1 of the RSS deals with town centres and states that 'In order to meet the needs of local communities within the region, local authorities and other agencies will work together to ensure that the vitality and viability of the regions existing network of towns and city centre is maintained and enhanced.' It also states 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.

In general the aim of the strategy is to locate development in line with the 'town centre first' sequential approach. It also recognises that individual centres have to ensure they maximise the opportunity to market themselves appropriately and that consideration is taken to improve people's accessibility to town centres and existing major out of centre retail locations by alternatives to the private car.

http://www.southwest-ra.gov.uk/nqcontent.cfm?a_id=836

3. WHAT DO OTHER LOCAL STRATEGIES SAY?

Salisbury and Stonehenge Tourism Partnership

The partnership was established in 1995 (then called Tourism 2000). It is a public / private partnership with approximately 300 commercial members from all parts of the local tourism industry. The partnership's work includes the production of an annual visitor guide, an annual marketing campaign, the production of the tourism strategy for south Wiltshire and other marketing activities including a website (www.visitsalisbury.com).

<http://www.salisbury.gov.uk/leisure/tourism/salisbury-tourism-partnership.htm>

Towards 2015. Shaping tomorrows tourism (2005)

The tourism strategy for the South West of England has the following vision:

'By 2015 the South West of England will be internationally recognised as a model tourism destination. This will be achieved by creating a unique balance between its environment, communities, industry and visitor satisfaction, while earning long-term economic, environment and social benefit for the whole region'

Strategic aims are to:

- Drive up quality
- Deliver sustainable tourism
- Effective destination management

Recognises the importance of local authorities and local private / public sector partnerships in delivering the vision for a 'successfully, quality led tourism industry'

Strategy suggests that visitors to the South west are becoming as interested in the experience they expect to have, as they are in the destination they intend to visit.

Wiltshire, Salisbury and Stonehenge are identified as a major destination area and suggests that a Destination Management Partnership (DMP) should be set up for the area.

<http://www.towards2015.co.uk/downloads/Strategy.pdf>

Towards 2015 – The Rural Dimension

Once Towards 2015 – Shaping tomorrow's tourism was produced, it was identified that further sub strategies needed to be produced. This represents once such strategy,.

- Important that camping and caravan parks are allowed to continue to develop with additional services.
- Consider developing a Rural Pub development initiative to help maintain the viability of pub businesses.
- No evidence for more attractions in the region as a whole. The only exception being the potential development of the wildlife / environmental market.
- Do not over supply the restaurant, bistro and café sectors
- Ensure wise tourism is supported by the rural areas
- Further increase the use of local food and drink
- Continued support and development for countryside pursuits and traditional activities such as shooting, fishing, equestrian and walking.
- Recognise the value of the landscape and the impact of their decisions upon it
- Use our AONB's, World Heritage Sites to demonstrate sustainable tourism in action

<http://www.swtourism.co.uk/additional/docsys/SWTourismBrochure7.pdf>

Salisbury District Licensing Authority: Statement of Licensing Policy (2005)

The Licensing authority recognizes that fixed and artificially early closing times in certain areas can lead to peaks of disorder and disturbance on the streets when large number of people tend to leave

licensed premises at the same time. Long licensing hours may therefore be considered as an important factor in reducing friction at late night food outlets, taxi ranks and other sources of transport in areas where there have already been incidents of disorder and disturbance.

The Licensing authority does not wish to inhibit the development of a thriving and safe evening and night-time economy and recognizes the importance of tourism, local investment and employment opportunities. This must however be balanced with the concern of residents and businesses and the ability of local resources to cope eg, police, NHS and SDC services.

Whilst every application will be determined on its merits there will be a presumption against any premises selling alcohol for consumption on the premises between 12.00am and 8.00 am Monday to Thursday and between 2.00am and 8.00am on Friday, Saturday and Sunday.

http://www.salisbury.gov.uk/licensing_policy.pdf

Licensing Act (2003)

This Act relates to the provision about the regulation of the sale and supply of alcohol, the provision of entertainment and the provision of late night refreshments, about offences relating to alcohol and for connected purposes.

Salisbury District Council Cultural Strategy 2002-2007

Identifies the main cultural facilities a:

- Salisbury Arts Centre
- City Hall
- Guildhall
- Salisbury Playhouse, incorporating Studio Theatre and Stage 65 Youth Theatre

<http://www.salisbury.gov.uk/cultural-strategy.pdf>

4. PRIORITIES AT COMMUNITY LEVEL.

2005-2009 Community Strategy

There is not mention of tourism, leisure or the night-time economy in the community strategy.

<http://www.salisbury.gov.uk/living/your-community/community-planning/community-strategy>

Local Community Plans (Parish, Ward and Market Town Plans)

Mere and district community plan-

- Regenerating the local economy through tourism and the environment
- Stourton and Gasper - Local people should recognise tourism as part of their everyday lives.
- Farmers to diversify into alternative crops, and tourism & leisure activities.
- Appreciation of the countryside and tourism and leisure in rural areas.
- Alternative uses to be found for farm buildings, such as leisure, offices and workshops.

Nadder Valley Community Plan

- Listen to the local community about their ideas for recreation and leisure
- Research innovative projects to provide leisure and cultural activities for children and young people, such as music festivals.

Southern Area community plan

- Continued support for the expansion of Downton leisure facility. Continued promotion and support for Wise Card.

Stonehenge Community plan

- Salisbury District Council to offer help and advice to those businesses looking to diversify into tourism.
- Violent crimes include minor assaults outside pubs late at night as well as domestic violence.
- The military police are working closely with local police to reduce anti-social behaviour by soldiers, particularly on Friday and Saturday nights.

<http://www.salisbury.gov.uk/living/your-community/community-planning/community-strategy>

Amesbury Parish Plan

The parish plan would like to see an Amesbury specific tourism leaflet promoting the history of the town as well as the creation of a town train and an Amesbury 'brand' tourism.

Amesbury Community Strategic Plan 2006-2016

Promote Amesbury as a great place to shop, work and visit. Local residents would like more visitors to come to Amesbury to see the historical elements of the town. Stonehenge and the proposed enhanced visitor centre could being economic opportunity for the town. Proposes that the town could display artifacts as a museum etc or other cultural or educational centre. Develop a robust tourism promotional strategy that helps to draw visitors into the town.

<http://www.this-is-amesbury.co.uk/pdf/amesburyplan.pdf>

5. LEARNING FROM EXPERIENCE

Do existing policies Adequately Address This Topic?

Policy	Purpose	Comment
T1	Tourism in Salisbury district	Allows the development of new tourist attractions or facilities or improvement to existing facilities within the physical limits of settlements – this may be a bit too restrictive.
T2	Tourism in the countryside	Deas with development of tourism attraction or improvements to existing ones in the countryside subject to certain criteria, it may be too restrictive.
T3	Stonehenge visitor centre	Allows a new visitor centre to be provided for the Stonehenge World Heritage Site, a similar policy should be maintained.
T4	Tourist accommodation	Allows the construction of new hotels within on the edge of settlements, requires proposals for sites on edge of settlements to demonstrate more central sites have been investigated. We need a policy to prevent the loss of existing hotels. T4 needs to be more proactive, possibly with an allocation, but the main thrust of the policy is covered by PPS6.
T5	Hotel accommodation	Prevents the development of new hotels in the open countryside.
T6	Change of use of buildings to hotels	Allow the change of use of buildings to hotels or other tourist accommodation subject to effects on the amenity of the dwellings in the area
T7	Static Holiday caravans and permanent holiday accommodation –	Prevent proposals for static holiday caravans and permanent holiday accommodation in the open countryside unrelated to existing settlements, but allows small scale proposals if no adverse effect on the landscape. Need to be revamped owing to holiday cottages and holiday let conversions which have local economic benefits but can reduce local housing stock.
T8	Large-scale sites for touring caravans and tents in the AONB	Prevents the development of such sites unless it can be demonstrated that the site is adequately screened and the development would not have an adverse effect on the AONB
T9	Large-scale sites for touring caravans and tents elsewhere in the district	Allows such development adjacent to or within settlements or adjacent to main holiday routs subject to certain criteria.

There is no policy protecting accommodation stock where necessary or a sequential approach to the redevelopment / re use of redundant accommodation, securing the most appropriate re use within the local socio-economic context, as advocated in the emerging RSS..

The current Local Plan contains no specific policies relating to the night-time economy although there is existing supporting text in the Local Plan, which refers to shopping and associated uses.

Due to the National and Regional policy guidance and the findings from the recent Retail Study, it is considered that policies, which include reference to the night-time economy, should be included within the Core Strategy. It is considered that at town centre policy would adequately cover this topic.

6.0 KEY ISSUES AND SPATIAL PATTERNS

- Tourism is important enough to be addressed within the core strategy
- Should the council provide for at least one 100 bed 4 star hotel in Salisbury?
- Should the council provide for a boutique hotel in Salisbury?
- Should the council provide for 100 bed group / budget hotel?
- Should the council introduce a planning policy to provide for a high quality, flexible conference facility capable of attracting medium to large conferences?
- Should the council develop a policy to prevent the loss of hotel bed spaces in Salisbury including B&B's and guesthouses?
- Should the council develop a policy to ensure the sustainable location of tourist accommodation in the countryside?
- Should the council provide a policy for proposals for static and tourist caravan sites and holiday chalet developments even though no need has been identified?
- Should the council provide for an increase in leisure facilities in order to encourage more people to come to Salisbury in the evening rather than going to other centres?
- Should this be achieved through a policy that uses the city centre boundary and primary shopping frontages?
- Provide for an additional 5-7 cinema screens in Salisbury?
- Should this be through an extension to the existing cinema, a new small cinema of 5-7 screens or through a new 10-12 screen multiplex?
- Are there any other commercial leisure facilities that should be encouraged?
- Should a leisure quarter be designated?
- In more rural areas should the council support any tourism or leisure development that benefits rural businesses, communities and visitors so long as they do not harm the character of the countryside especially in statutorily designated areas?

7. OPTIONS

Based on the issues identified and the policy framework in place, this section draws together options. The tables below represent a long list of options from which the most realistic are identified in the final row. The impacts identified are compared against the sustainability criteria in the Appendix of this topic paper

Option No.	Nature of the Option	Key Drivers	Positive Impacts	Negative Impacts	Viability of proceeding with the option?	How will success be measured	Where is the option best pursued?
1	Is tourism important enough to be addressed within the core strategy?	GPG – Planning for Tourism, Salisbury's Tourism Strategy.	Tourism is recognised as an important part of our economy.	Unknown.	High	The tourism industry strengthens in the district.	Core Strategy and Salisbury and Wilton Area Action Plan for any site allocations.
2	Do not address tourism.	None.	Unknown.	Tourism may decline.	Poor	N/A	Do not pursue.
3	Should the council provide for at least one 100 bed 4 star hotel in Salisbury?	Salisbury's Tourism Strategy.	A higher quality facility is provided.	Unknown.	High, as long as there is market demand and site availability there is no reason why this cannot be delivered.	The opening of a new 4 star hotel.	Core Strategy and Salisbury and Wilton Area Action Plan for any site allocations.
4	Should the council provide for a boutique hotel in Salisbury	Salisbury's Tourism Strategy.	A higher quality niche facility is provided.	Unknown.	High, as long as there is market demand and site availability there is no reason why this cannot be delivered.	The opening of a new boutique hotel.	Core Strategy and Salisbury and Wilton Area Action Plan for any site allocations.
5	Should the council provide for 100 bed group / budget hotel	Salisbury's Tourism Strategy.	A 100-bed budget hotel is delivered.	Unknown	High, as long as there is market demand and site availability there is no reason why this cannot be delivered.	The opening of a new budget hotel.	Core Strategy and Salisbury and Wilton Area Action Plan for any site allocations.

Option No.	Nature of the Option	Key Drivers	Positive Impacts	Negative Impacts	Viability of proceeding with the option?	How will success be measured	Where is the option best pursued?
6	Should the council introduce a planning policy to provide for a high quality, flexible conference facility capable of attracting medium to large conferences?	Salisbury's Tourism Strategy.	A high quality, flexible conference facility is delivered.	Unknown.	High, as long as there is market demand and site availability there is no reason why this cannot be delivered.	The opening of a high quality conference facility.	Core Strategy and Salisbury and Wilton Area Action Plan.
7	Should the council develop a policy to prevent the loss of hotel bed spaces in Salisbury including B&B's and guesthouses.	Regional Spatial Strategy, identified need for more bedspaces in the Salisbury Tourism Strategy.	Bed spaces in the district are saved.	Unknown.	High, there is little reason why this could not be implemented.	Fewer hotels are able to gain change of use planning permission and instead a sold and promoted as hotels.	Core Strategy.
8	Should the council develop a policy to ensure the sustainable location of tourist accommodation in the countryside	PPS6, PPS7, Regional Spatial Strategy.	Tourist accommodation is located in urban areas that are easily accessible by public transport and by foot.	Facilities in more rural areas may not be able to develop / expand to the degree they may wish.	High, there is little reason why this could not be implemented	The majority of new accommodation is in urban areas.	Core Strategy.
9	Do not have a policy to ensure the sustainable location of tourist accommodation.	None.	Unknown.	Tourism accommodation could appear in very unsustainable locations.	Poor.	N/A	Do not pursue.
10	Should the council provide a policy for proposals for static and tourist	PPS7.	Controls such development and protects the landscape if	It might encourage such development to come forward.	High, there is little reason why this could not be implemented,	Controlled development of any such facility.	Core Strategy.

Option No.	Nature of the Option	Key Drivers	Positive Impacts	Negative Impacts	Viability of proceeding with the option?	How will success be measured	Where is the option best pursued?
	caravan sites and holiday chalet developments even though no need has been identified		such a development was proposed.		although no evidence base of need has been identified.		
11	Should the council provide for an increase in leisure facilities in order to encourage more people to come to Salisbury in the evening rather than going to other centres	PPS7, GVA Grimley Leisure and Retail Needs Study, Tourism Strategy, Salisbury vision.	Salisbury becomes a more attractive centre and attracts more people to come to Salisbury for their leisure activities.	If not managed increased anti-social behaviour may occur.	High, as long as there is market demand and site availability there is no reason why this cannot be delivered.	Delivery of high quality leisure and entertainment facilities.	Core Strategy and Salisbury and Wilton Area Action Plan.
12	Should this be achieved through a policy that uses the city centre boundary and primary shopping frontages?	PPS7, GVA Grimley Leisure and Retail Needs Study, Tourism Strategy, Salisbury vision	N/A	N/A	N/A	N/A	N/A
13	Provide for an additional 5-7 cinema screens in Salisbury	GVA Grimley Leisure and Retail Needs Study.	Salisbury becomes a more attractive centre and attracts more people to come to Salisbury rather than going to other centres for their leisure activities.	Unknown, however another use may have to be found for the existing cinema building, this would need to be carefully managed.	High, as long as there is market demand and site availability there is no reason why this cannot be delivered.	The opening of a new cinema	Core Strategy and Salisbury and Wilton Area Action Plan for any site allocations.
14	Do not provide for an additional 5-7	None.	Unknown.	Salisbury City Centre's role as	Unknown.	N/A	Do Not pursue.

Option No.	Nature of the Option	Key Drivers	Positive Impacts	Negative Impacts	Viability of proceeding with the option?	How will success be measured	Where is the option best pursued?
	cinema screens in Salisbury.			a leisure destination is diminished.			
15	Should this be through an extension to the existing cinema, a new small cinema of 5-7 screens of through a new 10-12 screen multiplex	As above.	As above.	As above.	As above.	As above.	As above.
16	Are there any other commercial leisure facilities that should be encouraged?	N/A	N/A	N/A	N/A	N/A	N/A
17	Should a leisure quarter be designated	GVA Grimley Leisure and Retail Needs Study.	Salisbury becomes a more attractive centre and attracts more people to come to Salisbury rather than going to other centres for their leisure activities.	May be disruption during construction	High, as long as there is market demand and site availability there is no reason why this cannot be delivered.	The opening of a new leisure quarter.	Core Strategy and Salisbury and Wilton Area Action Plan for any site allocations.
18	Do not designate a leisure quarter.	None.	Unknown.	Salisbury City Centre's role as a leisure destination may be diminished.	N/A	N/A	Do not pursue.
19	In more rural areas should the council support	PPS7	Helps the rural economy to be successful, and	Development in the countryside may not be	High, as long as it is carefully managed.	A successful and less deprived rural economy.	Core Strategy.

Option No.	Nature of the Option	Key Drivers	Positive Impacts	Negative Impacts	Viability of proceeding with the option?	How will success be measured	Where is the option best pursued?
	any tourism or leisure development that benefits rural businesses, communities and visitors so long as they do not harm the character of the countryside especially in statutorily designated areas?		prevents more people from having to commute to work.	appropriate to the setting and people may not commute to work.			

8. INITIAL CONSULTATION

Sent to Bryn Jones in economic development and licensing, e-mail response received 30/5/2007, amendments made to topic paper as a result.

The following were sent a copy of the topic paper on 1 June 2007:

The Licensing Officer, Divisional Police HQ
Salisbury District council environmental health
Salisbury Tourism Partnership

No responses have been received.

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The tourism strategy has been underpinned by the following local evidence base:

[Economic impact of tourism in Salisbury](#) - South West Tourism (2003)
[Salisbury destination benchmarking victory survey](#) - Tourism South East (2004)
[Accommodation facilities in Salisbury - Infrastructure evaluation](#) Bournemouth University (2005)
[Leisure facilities in Salisbury – Infrastructure evaluation](#) - Bournemouth University (2005)
[South Wiltshire economic assessment](#) - Salisbury District Council (2005)
[South Wiltshire tourism SWOT analysis](#) - Salisbury District Council (2005)
[Towards 2015 - Shaping tomorrow's tourism](#) - South West Tourism (2005)

All are available at:
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