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Wiltshire Retail and Town Centres Study 2020

Volume 1: Main Text

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Contents

Appendices (Bound Separately)

1. Introduction

1.1 This Retail and Town Centres Study ('the Study') has been prepared by Avison Young ('AY') for Wiltshire Council ('the Council') to provide evidence base information on retail and town centre planning issues associated with the Wiltshire Local Plan Review. The Local Plan Review will, when adopted, replace the Wiltshire Core Strategy, which was adopted in 2015, and will set the development strategy for Wiltshire up to 2036.

1.2 Key elements of the Local Plan Review will be retailing and town centre issues. Town centres lie at the heart of local communities in Wiltshire providing essential shops, services and other community functions. They are also a key focus for national Government policy, with the latest version[1] of the National Planning Policy Framework ('NPPF') indicating that planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. As set out in the next section of this document, the NPPF (February 2019) requires planning policies around retail and town centres to achieve a number of objectives, including defining a network of 'town centres', defining town centre boundaries and primary shopping areas, allocate sites to meet the scale and type of development needed and also to recognise the role that residential uses play in supporting and enhancing town centre vitality.

1.3 As a consequence of these requirements, the Council requires an up to date set of evidence across a range of retail and town centre issues and has set the following objectives for this Study:

- Review primary shopping areas and town centres boundaries, including those more recently defined by made Neighbourhood Plans. Identify existing uses within these primary shopping areas and the range of uses more generally within town centres.
- Understand the retail, leisure and other main town centre needs for the next 5, 10 and 15 years using both quantitative and qualitative methods, taking account of the emerging growth strategies set out in the Local Plan Review.
- Identify and appraise opportunity sites to meet specified needs either within town centres or edge of centre locations.
- Understand where employment and residential uses may have a role in larger town centres.
- Gain an understanding of the Unique Selling Point ('USP') of the town centres within the hierarchy, and identify opportunities to support a USP in individual town centres.
- Identify strengths and weaknesses in individual centres - e.g. out of centre retail and other significant outlying 'main town centre uses', which could be competing against/undermining the town centre offer, and/or meeting demands for comparison goods where they cannot be met in town centres.
- Distinguish the appropriate planning tools available and place specific aspirations that would enable town centre regeneration and the delivery of potential sites identified for development.

[1] February 2019

- Understand the trends in changes of use/vacancy rates that have been apparent in each defined town centre.
- Consider the relationship that communities have with different centres and the provision of convenience goods.
- Define the terms 'district centres' and 'local centres' and the scale/range of acceptable uses within these. Understand the role that these have outside of defined centres at larger settlements.
- Guide the development of new district and local centres to meet needs forecast to arise as part of the emerging strategies at larger settlements.
- Evaluate policy options for Council wide strategies and area-based approaches/allocations, where relevant and understand the different policy approaches and options for the emerging Local Plan Review.
- Review the impact assessment threshold in Policy CP38 of the adopted Core Strategy.

1.4 In order to meet these objectives, this Study has undertaken a comprehensive review of the key issues facing retail land uses and town centres across Wiltshire, including: town centre health checks, a review of current shopping patterns and the usage of town centres, a review of retail and town centre trends and the current forecasts for the future in these areas, a review of how planning policy at the national level has changed since the adoption of the Core Strategy and previous evidence base studies, along with an assessment of any sites in and around town centres across Wiltshire can meet identified needs.

1.5 The preparation of this Study has been informed by the gathering of the following empirical research data:

- AY has undertaken land use surveys in each of the main 'town centres' across Wiltshire. This has included updating available Experian GOAD plan data published by Experian to a 2020 base level and, where Experian GOAD is not available, undertaking our own surveys of retail uses within defined 'town centre' boundaries. The data has been classified into the standard Experian GOAD retail land use classifications in order to provide consistency with previous land use uses.
- The Council and AY have commissioned a new survey of household shopping and leisure patterns in order to inform the quantitative and qualitative need assessments and town centre health checks. The survey conducted in February 2020 sought data on main and top-up food shopping patterns, various types of comparison goods shopping, visits to leisure facilities (such as cinemas, restaurants and cafes) along with the usage of town centres. Further details regarding the content of the household survey can be found in Section 4 of this Study.

1.6 This Study follows two previous retail and town centre studies commissioned since the formation of the Council in 2009. In March 2011 the Wiltshire Council Town Centre Retail Study ('the 2011 Study') was published. The 2011 Study was prepared by GVA (now AY) and provided a comprehensive review of town centre health and retail floorspace need issues. The 2011 Study was informed by a household survey of shopping patterns which was undertaken in June 2010. In February 2015, GVA completed the Wiltshire Core Strategy Retail Review ('the 2015 Study').

1.7 The 2015 Study superseded part of the 2011 Study, insofar as quantitative retail floorspace need forecasts were concerned, and provided additional information and analysis on the 'town centre' hierarchy across Wiltshire, town centre and primary shopping area boundaries and the wording of development management planning policies. This Study does not intend to supersede the 'town centre' hierarchy work undertaken in the 2015 Study, but it will supersede previous retail floorspace assessments and also re-visit planning policies and town centre boundary definitions to ensure that they remain fit for purpose in light of (A) the latest land use survey information, and (B) recent changes in national planning policy and planning legislation.

1.8 From the outset of this Study, it should be noted that its preparation commenced at the start of 2020 before the severe impact of the COVID-19 pandemic on the UK economy (and how the population went about their working and day-to-day lives) was fully realised. We can confirm that almost all of the evidence base data for the Study was collected before the government introduced lockdown measures (in March 2020) and that the economic forecasts adopted for our quantitative assessment are dated October 2020. As a consequence, the factual content of this Study should be read and understood in this context. Moreover, as will be discussed further later in this report, the impact of the COVID-19 pandemic is, based upon current predictions, likely to have long-lasting effects on the UK economy and how people interact with retail, leisure and wider town centre uses. Therefore, the content of this Study should be seen as a baseline for the evidence base library for the Local Plan Review and there will be a need for the Council to consider updates to the health checks, economic forecasts and shopping patterns in due course, as the preparation of the Local Plan Review progresses.

1.9 The remainder of the main text volume of this report is structured in the following manner:

- Section 2 provides a summary of the current development plan policies across Wiltshire which are relevant to retail and town centre planning matters, along with the content of current national planning policy and other material legislative factors.
- In Section 3 we outline the key trends influencing the health of town centres in recent years including the changes which have occurred in the retail and leisure sectors, along with the current observations regarding the on-going impact of the COVID-19 pandemic.
- Our review of the health of the main 'town centres' across Wiltshire is contained in Section 4, including the results of our land use surveys and the results of the 2020 household survey regarding the market share of town centres and their usage by local residents.
- Section 5 provides our assessment of the need for retail and leisure floorspace across Wiltshire over the period between 2020 and 2036. This assessment examines convenience and comparison goods retail floorspace needs in each of the main settlements, along with leisure floorspace in the larger settlements. Our assessment has considered both quantitative and qualitative factors.
- In Section 6 we provide an assessment of potential redevelopment sites in and around 'town centres' across Wiltshire to provide new land uses which will make a contribution to the health and attractiveness of those centres.
- Our advice on planning policies and town centre boundaries is contained in Section 7. It considers the most appropriate approaches to planning policy for retail uses and town centres for the Local Plan Review.

- Finally, we provide a summary of the findings of this report in Section 8.

1.10 All statistical information, plans and other documentation referred to in the main text of this report can be found in a separate volume of appendices.

2. Policy Review

Local Planning Policy

The Development Plan for Wiltshire

2.1 The development plan for Wiltshire comprises several documents including the 2015 Wiltshire Core Strategy, the Wiltshire Housing Site Allocations Plan, the Chippenham Site Allocations Plan, a suite of Minerals and Waste Plans and a number of 'made' Neighbourhood Plans.

2.2 In relation to retail and town centre matters, Core Policy 38 of the Core Strategy outlines the Council's approach to the assessment of retail and leisure proposals over 200sq m gross located outside of town centres. It indicates that such proposals should be accompanied by an impact assessment which demonstrates that it will not harm the vitality or viability of nearby places and also that it complies with the sequential approach.

2.3 In relation to strategic allocations, the main retail-related allocation is the Maltings and Central Car Park in Salisbury city centre (Core Policy 21). The Core Strategy identifies this site for a retail-led mixed use development including circa 40,000sq m of retail floorspace, up to 200 new dwellings, office floorspace, leisure uses, a replacement/remodelled library, plus replacement car parking.

2.4 The other notable town centre retail allocation is the Bath Road car park / Bridge Centre site in the north-western part of Chippenham town centre. Core Policy 9 indicates that redevelopment of the site should form a retail extension to the town centre to provide a supermarket and comparison units.

2.5 In addition to policies in the Core Strategy, a number of retail and town centre policies in the former District's Local Plans have been saved. These are:

- North Wiltshire Local Plan 2011:
  - R1 – town centre primary frontage areas
  - R2 – town centre secondary frontage areas
  - R7 – upper floors in town centres
- West Wiltshire District Plan
  - SP1 – town centre shopping
  - SP2 – land at Court Street / Castle Street, Trowbridge
  - SP4 – primary retail frontages
  - SP5 secondary retail frontages
  - SP6 – local shopping in towns and villages
- Kennet Local Plan:
  - ED18 – prime shopping areas
  - ED19 – Devizes and Marlborough town centres
  - ED20 – retail development in Devizes town centre

- Salisbury District Local Plan:
  - S1 – primary frontages in Salisbury and Amesbury
  - S2 – secondary shopping areas in Salisbury and Amesbury
  - S3 – location of retail development
  - S5 – Shopping (Brown Street Car Park)

Material Planning Policy Documents

2.6 Wiltshire Council's Strategic Planning Committee and Full Council have endorsed the masterplan for the redevelopment of The Maltings and Central Car Park, Salisbury. The masterplan provides a clear approach for how the site is to be redeveloped over the coming years and indicates that whilst Core Policy 21 is explicit in stating the quanta of specific end uses, this has been superseded by changing circumstances and the endorsed brief responds positively to this.

2.7 The endorsed brief indicates that the Council will approach proposals for the redevelopment of the site with pragmatism and will consider a wide range of land uses for the site, including: retail, food/beverage uses, leisure/cinema, office, residential, a new library, theatre and conference space, health care uses, warehouse clubs/outlet centres, nightclubs and casinos. The brief divides the site up into five distinct geographic zones and these are discussed later in this document when we examine the potential of the Maltings/Central Car Park site to provide a future positive contribution to the health and attractiveness of Salisbury city centre.

The NPPF (February 2019)

2.8 At the time of adopting the Core Strategy in 2015, the 2012 version of the NPPF was the current version of national planning policy. The NPPF has subsequently been revised and Section 7 of the February 2019 NPPF deals with retail, leisure and main town centre land use issues and closely follows the 2012 version of the NPPF. The main changes insofar as retail, leisure and main town centre land use issues are concerned are:

- Whilst the two main policy tests for proposals outside of town centres (and not in accordance with an up to date development plan) remain the sequential and impact tests, the new NPPF (2019) has clarified the issue of availability of alternative sites (in the sequential test) as being available within 'a reasonable period of time'. However, there is no definition (or guidance) as to what is 'a reasonable period of time' in the context of proposals for main town centre uses.
- The new NPPF has deleted the requirement for local authorities to define primary and secondary retail frontages in development plan. The new NPPF still requires local authorities to define town centre boundaries and primary shopping areas.
- Whilst the requirement to allocate sites to meet identified needs remains, the new NPPF indicates that this should be at least ten years ahead, rather than the full plan period as previously advised.
- The new NPPF does not now provide any guidance on how 'needs' should be assessed for main town centre uses (previously quantitative and qualitative indicators were cited).

National Planning Practice Guidance

2.9 Following initial publication in 2014, the NPPG on town centre planning policy was updated in July 2019 and September 2020. The latest version sets out the recommended content of town centre strategies, the indicators which are useful for planning for town centres and high streets, the permitted development rights which are available in relation to main town centre uses and also how local authorities should approach the application of the sequential and impact tests in terms of both plan making and development management issues. The NPPG also provides guidance on setting a locally appropriate impact assessment threshold which is considered in further detail in Section 7 of this document.

Other Considerations

Permitted Development and the Use Classes Order

2.10 In recent years, in response to the challenges faced by town centres and high street retailers (and other commercial uses) national government has introduced more flexibility into the permitted development rights system. Permitted development has long been an element of the planning system in England although the following updated rights were in place at the commencement of this Study:

Table 2.1: Permitted Development Rights (Changes of Use) in force at the start of 2020

From	To
A1 (shops)	• A2 • A3 up to 150m^2 and subject to Prior Approval • D2 up to 200m^2 and subject to Prior Approval and only if the premises was A1 use on 5th December 2013 • A mixed use comprising an A1 or A2 use and up to 2 flats may also be permitted subject to meeting certain conditions • C3 up to 150m^2 and subject to Prior Approval.
A2 (professional and financial services) when premises have a display window at ground level, but excluding betting offices or pay day loan shops	• A1 • A3 up to 150m^2 and subject to Prior Approval • D2 subject to Prior Approval and only if the premises was in A2 use on 5th December 2013 • A mixed use comprising an A1 or A2 use and up to 2 flats may also be permitted subject to meeting certain conditions • C3 up to 150m^2 and subject to Prior Approval.
A3 (restaurants and cafes)	A1 or A2
A4 (drinking establishments)	A4 drinking establishment with A3 (restaurants and cafes)
A5 (hot food takeaways)	A1 or A2 or A3
A4 drinking establishment with A3 (restaurants and cafes)	A4 (drinking establishments)

B1 (business)	Up to 500m^2 B8.
B2 (general industrial)	B1
B2 (general industrial)	Up to 500m^2 B8
B8 (storage and distribution)	Up to 500m^2 B1 C3 (subject to prior approval)
C3 (dwelling houses)	C4 (small houses in multiple occupation)
C4 (small houses in multiple occupation)	C3 (dwelling houses)
Sui Generis (casinos)	• D2 • A3 only if existing building is under 150m^2 and subject to Prior Approval • C3 up to 150m^2 and subject to Prior Approval.
Sui Generis (betting offices and pay day loan shops)	• A1 • A2 • C3 up to 150m^2 and subject to Prior Approval • A mixed use comprising a betting office or a pay day loan shop, or an A1 A2 use and up to 2 flats may also be permitted subject to meeting certain conditions. • D2
Sui Generis (agricultural buildings)	A1, A2, A3, B1, B8, C1, C3, D2, all subject to meeting relevant criteria and Prior Approval.

2.11 However, in July 2020, the government introduced a significant change to the land use classes order. The changes came into effect on the 1st September 2020 and revoking Parts A and D of the existing use classes order. In relation to retail and main town centre uses the changes will be as follows:

- A new Class E is to be introduced which will encompass the former A1, A2, A3, B1a, B1b, B1c and part of the D2 use class (for gyms and indoor recreational facilities)[2].
- The former A4 and A5 uses will now become sui generis uses, as will part of the former Class D2 uses comprising cinemas, concert halls, bingo halls and dance halls.

2.12 These changes will have implications for the formulation of development management policies in Wiltshire and are discussed in more detail later in this Study.

[2] Not involving vehicles or firearms

3. Retail and Town Centre Trends

Economic Context

Overview

3.1 A common and necessary introductory part of any retail and town centres evidence base study is to set the context in terms of recent, current and potential future trends in the economy. This section of the Study provides this analysis although the on-going and uncertain effects of the world-wide COVID-19 pandemic mean that forecasts maybe subject to change due to the fast-moving circumstances of the pandemic. Therefore, this section provides the following information and analysis:

- The potential scenarios for the UK economy as a consequence of the COVID-19 pandemic;
- A review of the prospects for the UK economy and retailing in pre-COVID-19 'normal' circumstances; and
- Information on how the COVID-19 pandemic is affecting retailing and town centres.

3.2 Prior to the outbreak of COVID-19 in the UK, the UK economy slowed over 2019, with growth sliding to a 7 year low by the end of the year. The period was dominated by heightened Brexit uncertainty and a weaker global economy. Against this backdrop, business investment declined for the second year in a row and exports remained sluggish. Consumer spending also lost momentum, reflecting low confidence and lacklustre incomes growth. The outcome of the December 2019 general election has removed near-term political uncertainty and the risk of a no-deal Brexit, empowering the government to push forward with spending pledges and EU withdrawal plans. At the start of 2020, the latest indicators pointed to a pick-up in business confidence and investment intentions. Housing market surveys suggested activity had been rebounding and consumer sentiment had also improved.

3.3 On the global front, a partial easing in trade disputes and loosening in monetary policy was encouraging. That said, lingering uncertainty over the outcome of the next phase of Brexit negotiations had expected to curb the pace of any investment recovery. Forecasts from Experian assumed an orderly transition to a new deep free trade agreement, but significant risks remain around the process, not least because of the extremely tight timetable (and now heightened by COVID-19). Alongside this, forecasts on the recovery in consumer spending were predicted to remain muted, reflecting modest incomes growth. Against this backdrop, GDP growth was predicted to remain on a slower growth trajectory of 1-1.5% over 2020 and 2021, well below the performance of earlier years.

COVID-19

3.4 The advent of COVID-19 has, and continues to have, a huge effect on all aspects of life around the world. Given that the full implications of COVID-19 are not yet able to be fully understood and predicted, Experian have outlined four potential scenarios and their potential characteristics. Experian's analysis and the various scenarios are outlined below.

3.5 The outbreak of COVID-19 will have a considerable impact on the UK and global economies. Due to the unprecedented nature of the event and absence of hard data, it is impossible at this point to be confident of

the scale and duration of the outbreak and the economic consequences of the measures to limit contagion. Hence, all forecasts will be subject to greater than usual uncertainty and volatility.

3.6 At the time of writing, Experian's view is that the V-shape cases outlined below are, on-balance, the more likely trajectories based on the scale of response from the UK and other governments. However, it should be noted from the outset of this analysis that the UK and global economy has never experienced a pandemic such as this and situation remains fast-moving. Indeed, whilst the UK started to ease certain 'lockdown' measures in June and July 2020, including the re-opening of non-essential shops (in controlled conditions), the prospect of a second wave of infections in August and Autumn/Winter 2020 has become greater, raising fears of a return to 'lockdown'. As a consequence, the content of this analysis should be seen as 'a point in time' and it will be important for the Council to keep matters under review during the life of preparing the Local Plan Review.

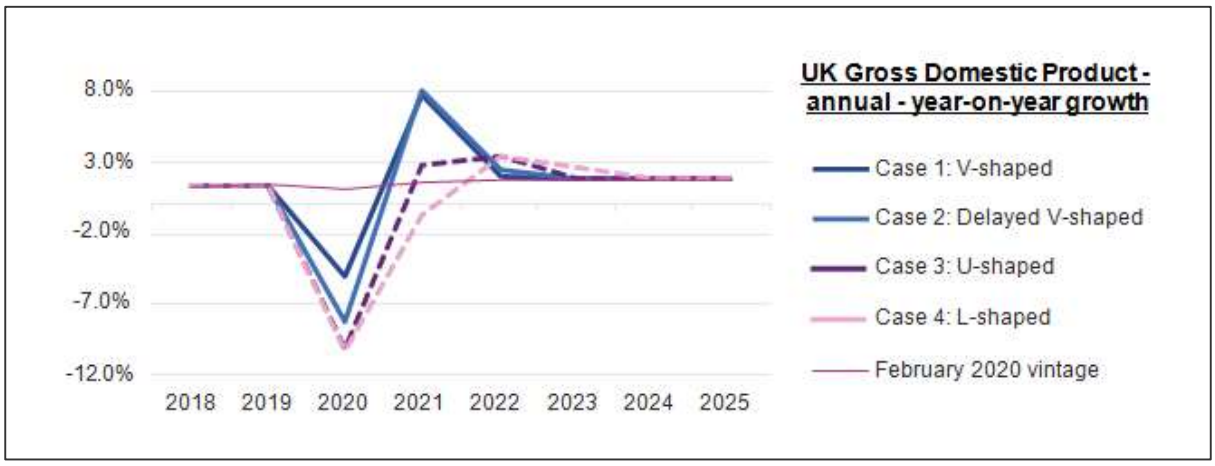
3.7 The scenarios provided by Experian assume that the government follows the Imperial College ('ICL') recommendations for an Adaptive Suppression approach to managing the epidemic. This would involve an intensive period where a number of interventions (case isolation, household quarantine, social distancing of the whole population and closure of schools and universities) would be implemented until the number of cases falls below an acceptable threshold.

3.8 ICL recommends maintaining these interventions for 5 months, which is assumed to be followed in all scenarios except the V-shape case (3 months). To support the effectiveness of the suppression measures, the government has enforced a period of 'lockdown' involving the temporary closure of non- essential businesses and activities. Thereafter, it would be possible to relax these measures as long as hospital cases remained below a target threshold.

Scenario Overview

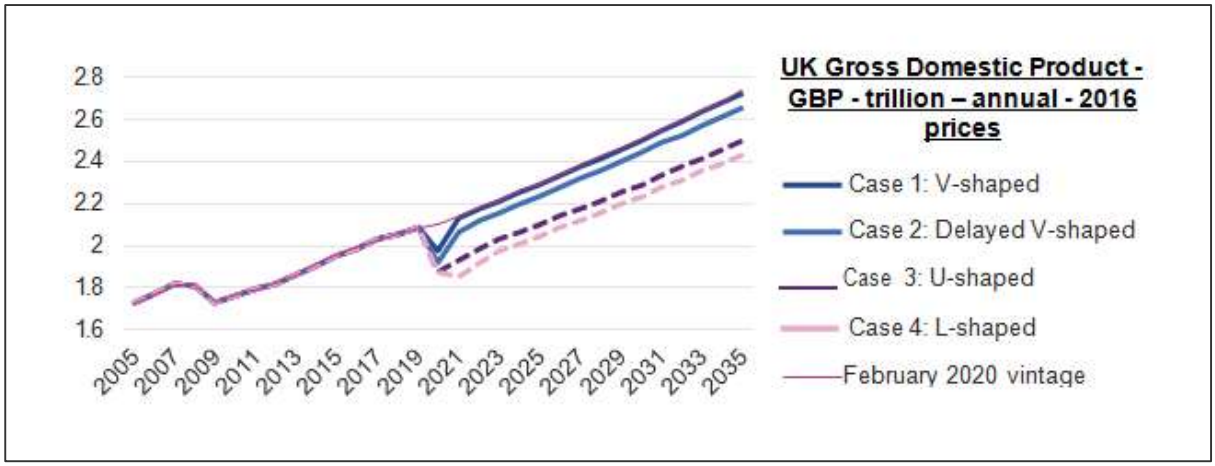
3.9 Table 3.1 below shows the various forecast scenarios for year-on-year growth in UK Gross Domestic Product ('GDP') up until 2025. In cases 1 and 2, the COVID-19 outbreak is contained relatively swiftly allowing GDP to rebound strongly in a V-shape following a sharp decline in Q2, with minimal long-term scarring. Case 3 has the virus contained in the same timeframe as case 2, however the economic impacts are more severe due to additional shocks arising from a tightening in credit conditions and further declines in Sterling. This results in a U-shaped, rather than V-shaped recovery. In case 4, the scale of the credit crunch and the Sterling declines are significantly deeper. As the economy emerges from the severe containment phase, it enters an extended period of stagnation/very subdued growth.

Table 3.1: forecast UK GDP per annum



3.10 In levels terms, the lost output in the first half of 2020 is quickly recovered in the first two cases. However, it persistently lags behind where Experian were projecting in their February 2020 forecast. The U and L shaped cases show a more gradual recovery. In the former, it takes roughly five years for all lost output to be recovered, broadly in line with the experience following the global financial crisis. In the latter, it takes longer still.

Table 3.2: GDP growth



3.11 The government has announced a range of measures to mitigate the impact on households and businesses and, at the time of writing, it appears that further policies may follow.

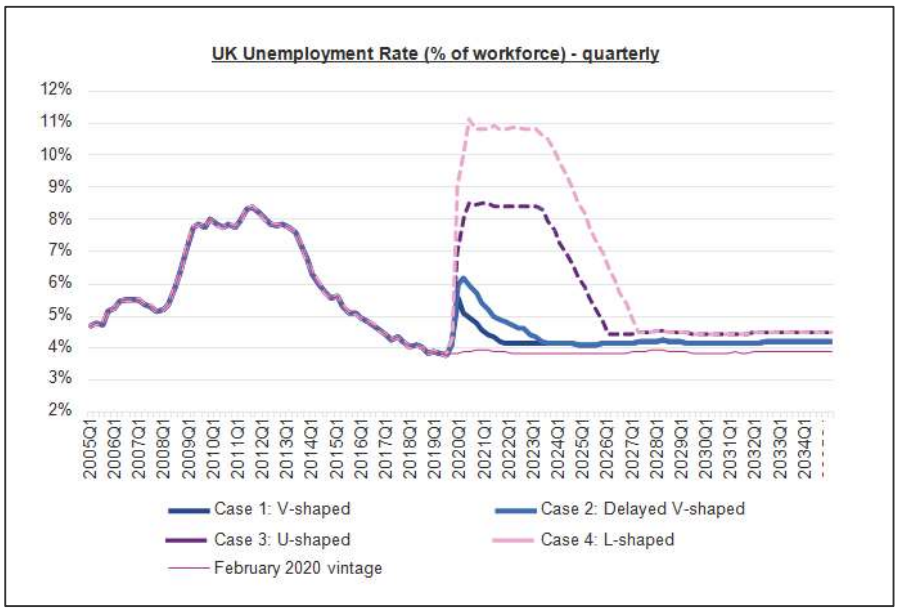
3.12 In cases 1 & 2, the fiscal response is expected to successfully rein in the rate of job shedding.

3.13 The unemployment rate is anticipated to rise sharply and substantially in the second quarter of the year, as a range of sectors of the economy such as retail, leisure and hospitality, reduce staff.

3.14 Experian's working assumption is that the scale of impact will be less than that of the last recession. However, because the effects are mostly concentrated in Q2, the hit is considerably higher than any single quarter of the 2008 recession.

3.15 In cases 3 and 4, the government measures to protect jobs are assumed to be far less successful, and the unemployment rate holds stubbornly high.

Table 3.3: forecast UK employment rate



Scenario 1: V Shaped Recovery

3.16 In this case, the suppression policy goals are achieved faster than the ICL's estimates and the timescales around securing a vaccine are also at the optimistic end of the estimates. The virus is successfully contained in 2020 Q2. Numbers infected reduce rapidly and fall below target thresholds by the end of June. Suppression measures begin to unwind in early 2020 Q3 and any resurgence of cases proves milder than expected.

3.17 Technology and infrastructure are sufficiently enhanced to enable speedy tracking and response times, so infection rates stay low and incidents remain localised. Wholesale suppression strategies are avoided and intensive global efforts secure a vaccine with sufficient stockpiles built to begin rollout to the 'at-risk' population group before the end of 2020.

3.18 In this scenario, the economic impacts are limited by the optimistic timeframes involved in bringing the epidemic under control. The reduction in infection rates triggers a swift rebound in investor, business and consumer confidence. Financial markets rebound and Sterling recovers. The tightening in credit conditions proves mild and short lived. Alongside this, mitigation efforts by the government prevent large scale job shedding and business insolvencies, which enables activity to recover relatively swiftly as workers return to normal working hours, businesses re-open and delayed investments are restarted.

Scenario 2: Delayed V Shaped Recovery

3.19 In this case, the suppression policy adopted is in line with the ICL's recommendations for 5 months of intensive action. Also, the timescales around securing a vaccine are at the midpoint of the range of the ICL's estimates of 12 to 18 months. Given this, the assumption is that the virus is successfully contained in Q3. Numbers infected reduce rapidly and fall below target thresholds by the end of August. Suppression measures begin to unwind in September and the resurgence of cases is well controlled. Technology and infrastructure are sufficiently

enhanced to enable speedy tracking and response times, so infection rates stay low and incidents remain localised.

3.20 Wholesale suppression strategies are avoided and intensive global efforts secure a vaccine and sufficient stockpiles are built to begin rollout to the 'at-risk' population group during 2020. The economic impacts vary from the V-shape case in the following ways:

- The longer containment period leaves confidence subdued for longer in 2020, resulting in weaker outcomes for consumer spending and business investment.
- The impact of government mitigation polices has a fair amount of success. A tightening in credit conditions proves mild and short lived, while Sterling stabilises. However, due to the longer containment period there are more job losses and business insolvencies than the V-shape case.
- The economic recovery is V-shaped but postponed until late 2020 Q3 and 2020 Q4.
- The relatively longer period of weakness results in greater scarring than the V Shape case.

Scenario 3: U Shaped Recovery

3.21 In this case, the timescales for addressing the pandemic threat are the same as the Delayed V-shape recovery case, but the economic impacts are more severe due to additional shocks arising from a tightening in credit conditions and further declines in Sterling.

3.22 The suppression policy adopted is in line with the ICL's recommendations for 5 months of intensive action. Also, the timescales around securing a vaccine are at the midpoint of the range of the ICL's estimates of 12 to 18 months. Given this, the assumption is that the virus is successfully contained in Q3.

Scenario 4: L Shaped Recovery

3.23 The main difference between this and the U-shape case is that the scale of the credit crunch and Sterling decline is significantly deeper. The assumptions around the timescales for bringing the pandemic under control remain similar. In this case, as the economy emerges from the severe containment phase, it enters an extended period of stagnation/very subdued growth.

Consumer spending

3.24 Household spending growth slowed to an 8 year low of 1.2% in 2019. Consumer appetite for durables, property and, in particular, cars was notably muted. Low confidence was a major drag, but tepid growth in household incomes was also a factor behind the lacklustre spending trend. Despite another year of robust labour market conditions, with over 300,000 jobs created, incomes growth averaged a disappointing 1% in 2019. A pick-up in wage growth and receding inflation also provided a boost to earnings growth. However, this was offset by a continued squeeze in welfare benefits and other incomes sources. Looking ahead, prospects for incomes remain mixed. A positive is the very benign inflation backdrop. Combined with the boost to wages from more generous public sector pay and uprating to the National Living Wage, the recovery in real wages should remain intact over the coming year. However, this will be offset by a projected slowdown in the place of job

creation to more sustainable levels. Another positive factor is the end of the freeze on working-age benefits, but the on-going roll out of other welfare reforms will continue to bite. Given this, real incomes is projected to average 1.3% this year and consumer spending growth will remain in sub-1.5% territory.

Retail

3.25 Retail sales volumes grew by 3% in 2019, the weakest reading since 2014. There was a marked slowdown in growth over the course of the year, reflecting low confidence and sluggish incomes. The weakening trend was concentrated in non-food stores, which started the year with growth above 4% and ended with declines not seen since early 2012. Department stores and household goods retailers bore the brunt, suffering from a fall in sales of durable goods. Demand for household goods has suffered as the housing market remained in the doldrums for a second year. In contrast, sales from predominantly on-line retailers picked up momentum with growth rising to 15%, compared with 10% in 2018. As a consequence, even before the advent of COVID-19, prospects for retail sales remained subdued. Household incomes gains were set to remain modest in 2020 although whilst the government's furlough scheme has been hugely ambitious, incomes since March 2020 have been impacted significantly with job losses becoming significant (as certain sectors experience extreme impact on how COVID-19 affects businesses).

Medium term outlook

3.26 The UK left the EU on January 31st 2020 and entered a transition period which allows continued access to the European single market while the next phase of negotiations take place. The transition period ends in December 2020, leaving a tight timetable for negotiating, amongst other things, a new trading relationship with the EU. Given this, there remains a real risk of another 'no deal' cliff edge as the transition deadline approaches (no doubt heightened by the impact of COVID-19). Experian's forecasts adopted in the quantitative assessment in this Study assume that this is avoided and a limited trade deal is struck. During 2021, the assumption is that negotiations are concluded for sectors not covered by the initial deals.

3.27 At the time of preparing this Study, there remains much uncertainty over what balance the government will strike on the trade-off between an agreement which minimises trade friction and the right to diverge from EU rules, which could lead to higher costs and reduced market access. The economic forecasts provided by Experian for use in this Study assume that the final outcome is a deep trade deal that allows continued access to EU markets. We continue to monitor progress and as the nature of the agreements become clearer we will adjust the baseline accordingly.

3.28 Experian's forecasts assume an orderly adjustment to the new trading environment. As Brexit related uncertainty ends, business investment should recover. However, the resultant increase in trade barriers will result in lower productivity and export performance than would have otherwise been the case.

3.29 Alongside this, Experian predict that fiscal policy will be more supportive than over the past decade. The baseline forecasts only incorporate announced policy so there is scope for upside from the March 2020 Budget. The government's increased majority should clear the path for it to push forward with policy priorities on regional development, infrastructure and health.

3.30 At the present time, Experian have not revised their projections for productivity and potential GDP growth, which drive the outlook over the medium/longer term. For the 2022-26 period overall, GDP growth is expected

to average 1.8% per annum, compared with 2.0% during 2010 to 2018 and 2.6% from 1981 to 2007. Alongside this, the consumer spending outlook is little changed, forecast to average 1.8%, with retail sales averaging 2.7%.

Long term outlook

3.31 The final terms of the new economic relationship between the EU and the UK remains a major consideration for the long term outlook and Experian's assumptions on this front are little changed from previous years. The baseline forecasts assume that the UK will continue to have access to the single market under the new arrangement. However, it is unlikely that the new terms will be as favourable as full EU membership, which in turn impacts the long term outlook for trade, investment and GDP.

3.32 Population is forecast to expand on average 0.3% per annum over 2030-2040, which is below the average of 0.8% observed during 2005-2016. Productivity growth is expected to recover from recent lows to 1.4%, but will be well below the 2.4% averaged in the decade preceding the last recession. Given this, our long term GDP growth forecast remains at around 1.7%, below the historic long-term trend growth of 2.3%.

3.33 Revisions to the consumer spending outlook are minimal, with long term growth forecast at 2.2%, underpinned by gains in population and household incomes. However, downside risks clearly exist from a more marked slowdown in EU migration than projected.

3.34 The expansion in comparison goods volumes, averaging 3% per head to 2040 will be similar to the preceding decade but less buoyant than historic trends as key factors that boosted growth, notably the globalisation that subdued audio visual prices significantly, will not be repeated to the same degree.

3.35 Per head spending on convenience goods has slowed sharply in the last couple of years. Experian project that growth will remain a modest 0.1% over the long term, which is weaker than experienced in recent years but an improvement on the historic trend of annual 1% declines during 2000-2019.

Retail and Town Centre Trends

Internet Shopping

3.36 One of the key trends that has impacted on the retail sector and shopping patterns over the last decade has been the growth in internet shopping, which forms part of the definition known as 'special forms of trading' ('SFT'). Based on ONS data, Experian estimate that:

- The value of internet sales in 2019 was estimated to be £84.1bn (at current prices). This represents a +45% increase from £58bn recorded in 2016. Total non-store retail sales are estimated to amount to some £90.7bn in 2019 and is set to £203bn in 2036.
- To explain the differential in terms of growth between all retailing and internet retailing, in 2019 overall retail growth was 3% whereas internet sales grew by 9.6%. In 2020, overall retail sales are expected to grow by 2.5% whereas internet sales are likely to increase by 7.9%.
- The overall market share of internet sales, as a proportion of total retail sales, has increased nationally from 5.5% in 2006 to 20.2% in 2019. It is forecast by Experian to grow to 22% by 2021 and to 31% by 2036.

3.37 In relation to on-line grocery sales, most of the main national grocery businesses (apart from ALDI and Lidl) provide a delivery service, with Marks & Spencer expected to enter the market (in collaboration with Ocado) soon. The entrance of Ocado to the online market in 2002 made a big impact upon the strategies of the traditional 'big four' grocers and led them accelerate plans for the online channel. Ocado has a different type of operation to the traditional grocers whereby its orders are picked from warehouses (via robotics) whereas most orders from Tesco, ASDA, Waitrose etc are picked by staff in-store. The Ocado business model is very efficient but expensive to invest in initially. The in-store grocery picking system is less costly initially but is generally regarded as a loss-maker.

3.38 In 2020 two particular factors have had a key influence on on-line grocery sales. The impact of COVID-19 meant that many people were reluctant to visit shops and the experience of using foodstore, particularly in the first part of 'lockdown' become inefficient and time-intensive. This led to a significantly higher demand for on-line deliveries which the main grocers found it difficult to keep pace with. However, now that the initial shock has passed, grocers are trying to build in additional capacity and online sales have risen from 7% of the total grocery market at the start of 2020 to 13% by May 2020. Research by UBS in the UK found that 71% of those surveyed will shop as often or more after the COVID-19 situation improves.

3.39 The other development in 2020 has been the decision by Amazon to start offering free grocery deliveries to its Prime members. Amazon's grocery offering is sourced from a range of sources including Morrisons, Booths and Whole Foods and is, in due course, likely to add capacity to the delivery network particularly in urban areas. Whilst Amazon customers are paying indirectly for the delivery service, this move does mirror Ocado's entrance into the market although the latter did subsequently introduce charges in line with the other traditional grocery retailers.

3.40 The impact of COVID-19 has been even more significant for non-food shopping. Whilst a small amount of stores (classified as essential) remained open (under very strict controls) there has been a very significant shift to on-line sales, albeit subdued due to the furlough scheme and the risk of job losses. Initial data suggests that the initial spike will reduce as physical stores re-open although many commentators consider that the upwards trend in online sales is likely to be reinforced by the impact of COVID-19.

Changing Retailer Requirements

3.41 The economic downturn, the growth in internet shopping and the continued demand for out-of-centre shopping has resulted in national retailers reviewing and rapidly adapting their business strategies over the past several years, including new store requirements and existing store formats to keep pace with the dynamic changes in the sector and consumer demand.

3.42 This is probably best illustrated by the changes in the grocery sector over the last 6-7 years. Following a sustained period of growth over almost 20 years up to 2009/10, principally driven by new store openings, the focus for the main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) shifted earlier this decade to growing market share through opening new smaller convenience store formats (such as Tesco Express, Sainsbury's Local and Little Waitrose), a better customer experience and online sales. In relation to online sales, following the original entrants into the market (Tesco, Ocado, Sainsburys and ASDA), Morrisons

joined a few years ago and Marks & Spencer will start their own sales (in partnership with Ocado) in September 2020.

3.43 Over the past several years applications for large store formats have slowed to a virtual standstill and in some cases permissions are not being built out. At the other end of the grocery spectrum, the European-led 'deep discount' food operators (namely Aldi and Lidl) are increasing their market shares through new store openings across the UK. Iceland are also expanding their Food Warehouse format.

3.44 In the non-food sector, those retailers that experienced significant growth up to 2007/08 have had to adapt to the very different market conditions over the past dozen or so years. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high-end and value retailing, have largely struggled to maintain market share. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether, or have significantly reduced their store portfolio in centres across the UK (e.g. Debenhams, House of Fraser and Marks & Spencer).

3.45 Research also shows that there is an increasing polarisation and concentration of retailer demand and investment interest in the larger regional and sub-regional centres (i.e. the 'top 25-50' UK centres as defined by Javelin VenueScore rankings). This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. At the same time, retailer and investment demand is also mainly focussed on the prime retail pitches, with the secondary and tertiary pitches contracting and deteriorating in some centres due to limited demand, smaller shop units and increasing vacancies. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

3.46 Furthermore, many of the major multiples and traditional high street retailers are changing their store formats and locational requirements. For example, key anchor retailers such as Boots, Next, TK Maxx, John Lewis and Marks & Spencer have been seeking larger out of centre format units to showcase their full product range and to provide an exciting shopper environment backed by the latest (digital) technology.

3.47 As a result, it is the larger centres and out-of-centre retail parks that are often best placed to meet this demand; as larger units are difficult to accommodate within existing traditional high streets and town centres, particularly historic areas characterised by conservation areas and listed buildings. As a result, some traditional high street retailers are moving out of town centres to retail parks. For example, over recent years Marks & Spencer has closed a number of traditional variety stores on high streets and opened new M&S Simply Food stores in out-of-centre locations. M&S has also recently announced a further wave store closures. This further underlines the growing demand from multiple retailers for larger format shop units, and the need for town centres to provide a good mix of large modern units to help attract and retain high street retailers, or potentially risk their relocation to new competing shopping destinations as and when leases expire.

3.48 The on-going challenging environment facing the comparison goods sector has been exacerbated by the impact of the COVID-19 pandemic and the lockdown period imposed in March 2020. Many comparison goods stores were classified as non-essential shops and have only recently re-opened. Whilst a significant element of sales transferred on-line (to those retailers who had a good online sales platform) overall sales have been affected considerably. Data for July 2020 indicates that some retailers have experienced a good initial 'bounce' back, other retailers have indicated that they may not open all of their former stores. In addition, experience of comparison goods shopping trips, which were until recently taken as a quasi-leisure activity, has fundamentally changed which, in the short term, is likely to impact upon the attractiveness of town centres.

3.49 These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

4. Town Centre Health Checks

Introduction

Scope and purpose

4.1 This section of the Study provides a review of the key characteristics of the main 'town centres' across Wiltshire in order to provide an assessment of their vitality and viability. When assessing town centre health, the NPPG indicates that the following indicators may be relevant:

- diversity of uses
- proportion of vacant street level property
- commercial yields on non-domestic property
- customers' experience and behaviour
- retailer representation and intentions to change representation
- commercial rents
- pedestrian flows
- accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements.
- perception of safety and occurrence of crime[3]
- state of town centre environmental quality
- balance between independent and multiple stores
- extent to which there is evidence of barriers to new businesses opening and existing businesses expanding
- opening hours/availability/extent to which there is an evening and night time economy offer

4.2 Clearly, it will not be possible to collect data for every one of these indicators for all of the centres surveyed, particularly for some of the smaller centres, although data has been gathered where it is available. In addition to the above indicators, our health check assessment also takes into account the results of the household survey commissioned to inform this Study. The geographical extent of the area subject to this survey is shown on the plan contained at Appendix I and which has been sub-divided into various zones in order to gain detailed data on food and non-food shopping patterns and the usage of town centres. The survey has been designed to gain information, where available, on the following:

- First choice and other main food shopping destinations
- First choice and other top-up food shopping destination

[3] Data on reported crimes is provided for the main centres, in relation to the number of crimes over the past year. The number of reported crimes can be difficult to correlate to town centre health issues but has been provided in order to meet the recommendations of the NPPG.

- First choice and other destinations for the following types of comparison goods:
  - Clothing and footwear
  - DIY goods
  - Furniture, floors coverings and household textiles
  - Domestic appliances
  - Other electrical goods
  - Gardening goods
  - Health and beauty goods
  - Recreational goods
- Reasons for visiting town centres in the area local to a particular survey respondent.

4.3 The centres which have been subject to our health check review are as follows: Salisbury, Chippenham, Royal Wootton Bassett, Trowbridge, Warminster, Melksham, Amesbury, Bradford-on-Avon, Calne, Corsham, Cricklade, Devizes, Ludgershall, Malmesbury, Marlborough, Tidworth and Westbury. We have also reviewed the smaller villages of Downton, Mere, Market Lavington, Pewsey, Tisbury and Wilton.

The hierarchy

4.4 Core Policy CP1 outlines the settlement hierarchy across Wiltshire, comprising four tiers of centre: principal settlements, market towns, local service centres, plus large and small villages. As noted in the introductory section to this document, there is no requirement for this Study to re-visit the 'town centre' hierarchy although it is useful re-state the recommended 'town centre' hierarchy as outlined in the 2015 Study, which was based upon a basket of indicators including: scale and type or floorspace, market share and turnover factors, along with the national ranking of each centre.

Table 4.1: recommended 'town centre' hierarchy in 2015 Study

Centre	Recommended Position in Retail Hierarchy
Salisbury	Principal Settlement
Trowbridge	Principal Settlement
Chippenham	Principal Settlement
Devizes	Market Town
Warminster	Market Town
Marlborough	Market Town
Melksham	Market Town
Amesbury	Market Town
Bradford on Avon	Market Town

Calne	Market Town
Corsham	Market Town
Malmesbury	Market Town
Westbury	Market Town
Royal Wootton Bassett	Market Town
Tidworth	Market Town
Cricklade	Local Service Centre
Downton	Local Service Centre
Ludgershall	Local Service Centre
Market Lavington	Local Service Centre
Mere	Local Service Centre
Pewsey	Local Service Centre
Tisbury	Local Service Centre
Wilton	Local Service Centre

Amesbury

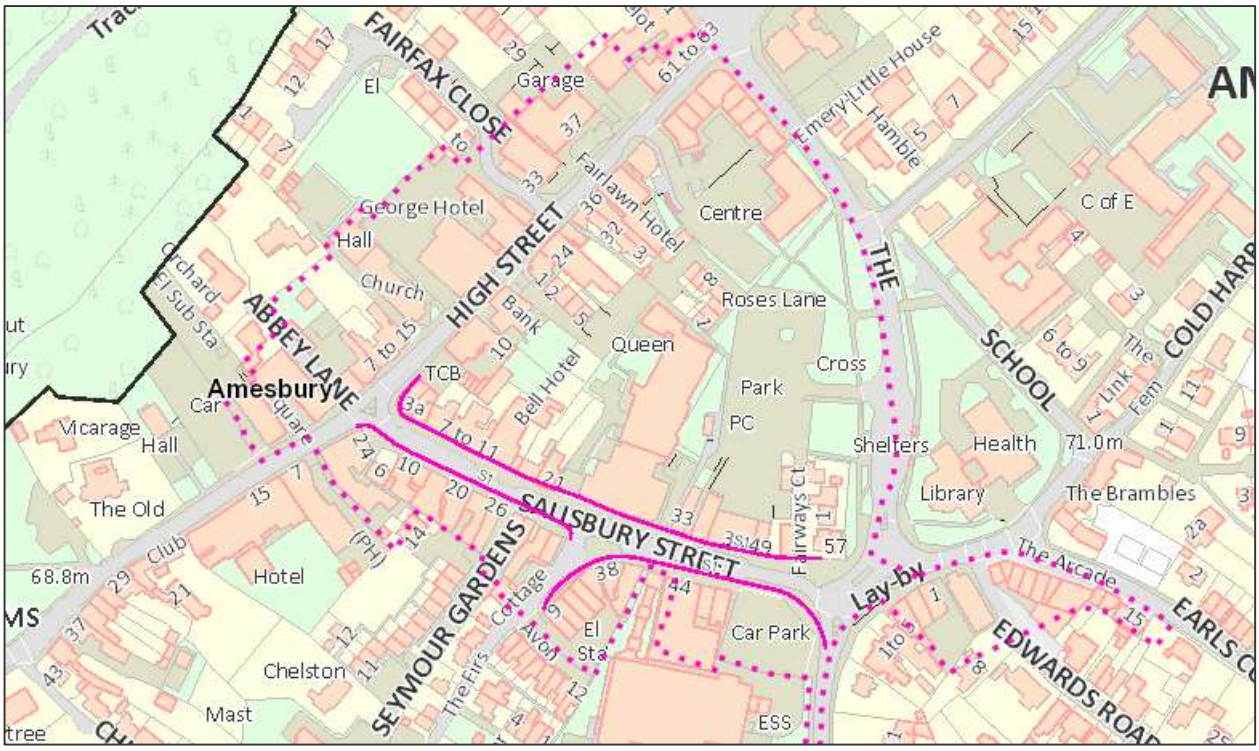
Structure

4.5 Amesbury is situated in the south-eastern part of Wiltshire, approximately 8 miles north of Salisbury and 19 miles east of Warminster. The World Heritage Site of Stonehenge is two miles to the west of Amesbury. The development of Solstice Business Park to the north of the town has brought economic and population growth to the area.

4.6 The town centre in Amesbury is arranged around High Street, Salisbury Street, Smithfield Street, the western end of Earls Court Road and The Centre/Stonehenge Walk. Salisbury Street is defined in the development plan as the prime shopping street, whilst these other streets are defined as secondary shopping areas.

4.7 An extract from the policies map for Amesbury town centre is contained in Figure 4.1 below.

Figure 4.1: extract from Wiltshire policies map for Amesbury town centre[4]



4.8 Amesbury town centre has a more modern appearance than many of the towns in the south east of the district, with a number of relatively modern, purpose built retail units particularly on Salisbury Street. The former Co-op supermarket off Salisbury Street has changed ownership to Aldi in recent years, however the Co-op is still represented in the town centre, albeit in a smaller retail unit on Salisbury Street.

Diversity of Uses

4.9 We have compared the land use mix of Amesbury town centre from Experian GOAD's 2011 and 2017 surveys and updated the latest (2017) survey to a 2020 base. The results are contained in Table 4.1 below.

[4] Continuous pink line represents prime shopping frontage, whilst dotted pink line represents secondary shopping area

Table 4.1: land use profile of Amesbury town centre, 2011 - 2020

	2011			2017			2020		
	No.	**%**	**UK Ave**	**No.**	**%**	**UK Ave**	**No.**	**%**	**UK Ave**
Convenience	5	6.3	8.6	7	8.5	9.4	7	8.5	10.1
Comparison	30	38.0	41.5	26	31.7	39.5	24	29	36.7
Service	32	40.5	35.1	41	50	37.9	42	51	39.0
Other	2	2.5	1.2	3	3.7	1.2	3	3.7	1.2
Vacant	10	12.7	13.7	5	6.1	12.2	4	4.9	13.0
Total	79	100	100	82	100	100	82	100	100

Source: Experian GOAD surveys in 2011 and 2017, plus AY update in 2020

4.10 The above data indicates that there has been a small rise in the number of convenience goods retailers in the town centre over the past nine years, from 5 to 7. The proportion of convenience goods retailers in the centre over this period has remained below the national average. The lack of material change in the convenience goods retail sector in the town centre is of particular note given the changes in this sector across the wider town over the past several years which are described later in this section.

4.11 Over the past nine years the number of comparison goods retailers in the centre has lost six units, equivalent to 20% of the number of retailers present in 2011. The proportion of comparison goods retailers is now well below the national average, having been close to the national average in 2011. In contrast, the number of service uses in the town centre have risen by one third over the past nine years from 32 to 42. In 2011, the proportion of service uses in the centre was above the national average and this has increased between 2011 and 2020.

Vacancies

4.12 Alongside the noticeable changes in the comparison goods and service retail sectors, Amesbury town centre has seen a falling number of vacancies in recent years (2011-2020). The number of vacant units has reduced from 10 in 2011 to 4 in 2020 and the proportion of vacant retail units in the centre is now well below the national average.

Retailer Representation

4.13 Within the convenience retail sector, the two largest stores are a Co-op on Salisbury Street and an ALDI (formerly a Co-op) accessed from Salisbury Road. The ALDI store offers a reasonably wide range of convenience goods, albeit on a limited line basis, along with a small comparison goods retail offer, and is served by an adjacent surface level car customer car park. The other convenience goods stores include a butcher, a baker and a McColls convenience store.

4.14 Within the comparison goods sector, retailers are generally local independents with the exception of Peacocks and Boots. As noted above, the proportion of comparison goods retailers in the centre is below the

national average and this is the case across many of the many of the comparison goods sub-categories. The one area where there is a higher than average proportion of uses is in relation to pharmacy and health uses.

4.15 As noted above, the number/proportion of service uses in the centre has risen between 2011 and 2020 and the proportions of food and beverage, health and beauty and estate agent uses are above their respective national averages. It is to be noted that there is a reasonably high proportion of service uses within the defined primary retail frontage area, as defined on the development plan policies map.

Customer Views and Behaviour

4.16 The household survey commissioned for this Study provides the following information regarding the usage of Amesbury town centre:

- Amesbury sits within Zone 9 of the study area / household survey area and the results of the survey show that the town retains circa 71% of all first choice main food shopping trips, 63% of all second choice shopping trips, 58% of all first choice top-up food shopping trips and 61% of all second choice top-up trips.
- Of the 71% of first choice main food trips retained by Amesbury, the ALDI has a 16% market share and other shops attract 2% of trips. The ALDI also has a 17% share of second choice main food trips. A significant amount of convenience goods trips are being attracted to the out of centre Tesco and Lidl foodstores.
- In relation to top-up food shopping trips, the ALDI has a 13% share of first choice trips, along with 1% for the Co-op on Salisbury Street and 8% for other stores in the town centre. For second choice trips, the ALDI and Co-op stores have a 4% market share apiece whilst other stores in the centre attract 8% of trips.
- In relation to comparison goods, the survey results indicate that Amesbury has a single digit (%) market penetration rate across a number of goods categories although the town is able to attract a higher share in the DIY, homeware and health/beauty categories. Around one fifth of DIY goods trips from Zone 9 residents are retained, whilst the retention rate of 11%-13% for homewares is split across the town centre and the out of centre Tesco store. The majority of health/beauty trips from Zone 9 residents retained by Amesbury are directed towards the town centre although it should be noted that the Tesco does have an influence across many of the comparison goods categories where Amesbury achieves a market share.

4.17 The household survey has also gathered information on the usage of Amesbury amongst local residents in Zone 9 of the study area. The results of the survey indicate that:

- 20% of local residents visit Amesbury daily, with a further 20% visiting twice a week. 18% visit several times a week and 22% visit once a week.
- In relation to the use of facilities in Amesbury, 29% of local (Zone 9) survey respondents use the town for non-food shopping, whilst 54% of those surveyed visit for main food shopping. 15% of local residents also use the town for top-up food shopping. 16% of Zone 9 residents also use Amesbury for visits to food and beverage establishments, whilst 11% visit the town for financial services.
- In terms of what local residents most like about Amesbury, the results of the household survey indicate that 'convenience' is a particularly important factor (28% of all local respondents). This is followed by the atmosphere in the centre (15%) and the easiness of parking (11%).

- In terms of dislikes about the centre, the survey indicates that the main issues are the cost of parking, the lack of multiple shops and traffic congestion. In relation to the suggested improvements which would encourage local residents to visit Amesbury more often, the most popular were: more local independent shops (13%), more national multiples (8%), free parking (5%), development of new shopping facilities (9%) and improvement in public transport links (5%).

4.18 The survey provides information on activities and in relation to Zone 9 residents the following data is provided:

- In relation to cultural activities the majority of trips are associated with Salisbury (62%), with 17% travelling to Southampton and 14% travelling to London. Salisbury is also the most popular destination for cinema-going amongst Zone 9 residents with the Odeon on New Canal attracting 56% of all trips. Andover attracts circa 35% of cinema-going trips from Zone 9 residents.
- Amesbury retains 37% of daytime trips associated with food and beverage outlets. 40% of such trips also flow to Salisbury city centre.
- Amesbury town centre has a slightly lower but similar share of evening food/beverage trips (32%), with a higher proportion of trips associated with Salisbury city centre (54%) which is unsurprising given the proximity of the city and the range of food/beverage outlets on offer.
- Amesbury has a sports and community centre, located on Antrobus Road. The centre has a fitness suite, sports hall, plus squash and tennis courts. Of those people who visit health and fitness facilities, 33% of Zone 9 residents visit this sports centre, whilst facilities in Durrington and Salisbury also provide popular destinations.

Environmental Quality

4.19 Overall, the quality of the built environment in Amesbury town centre is reasonably good. There is a varied mix of architectural styles with the western part of the centre (High Street and the western end of Salisbury Street) accommodating more historic properties, whilst other parts of Salisbury Street (particularly the eastern end) now accommodate modern post-war properties (although the units on the southern side of the road are unattractive). The overall standard of the built environment is generally good with a number of attractive and historic buildings along Church Street and the High Street. Recent pavement widening works have improved accessibility along Salisbury Street, although there are few seating areas. The built environment is generally well maintained and this adds to the attractiveness of the centre.

Pedestrian Flows

4.20 During visits to Amesbury town centre as part of the preparation of this study, pedestrian flows across the centre were observed. In line with the existing primary shopping definition, the highest levels of pedestrian flow were observed along Salisbury Street. Flows are lower along High Street and whilst linkages between the ALDI store and Salisbury Street are evident the orientation of the store (turning its back on the core shopping area) does not necessarily encourage such linkages.

Occurrence of Crime

4.21 In order to understand the occurrence of crime within Amesbury town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

Accessibility

4.22 Access to Amesbury is greatly assisted by the presence of the A303 which provides easy linkages to Andover to the east and South Somerset / East Devon to the west. Those wishing to travel to the town centre via private car have the choice of four main off-street car parks including: Central, Church Street, Salisbury Street and Aldi. On-street parking is also available on Salisbury Street, Flower Lane and the High Street.

4.23 In relation to public transport, there is not a railway station in Amesbury although bus services connect the town to Salisbury, Andover, Larkhill, Pewsey, Tidworth, Marlborough and Swindon. Bus stops are located on The Centre, Salisbury Street and Church Street.

Conclusions

4.24 Overall, Amesbury is considered to be a healthy town centre which has adapted to a changing retail landscape in recent years. Following the opening of the out of centre Tesco supermarket and also new retail provision at Solstice Park (Home Bargains), the convenience goods sector in the town centre has not experienced any material decline and ALDI have decided to invest in the centre by occupying the former Co-op foodstore. Vacancies have also fallen and, whilst the centre has a limited catchment, it is able to complement nearby Salisbury in relation to serving the local communities of South Wiltshire. It has also increased the size of its service sector by around one third over the past decade.

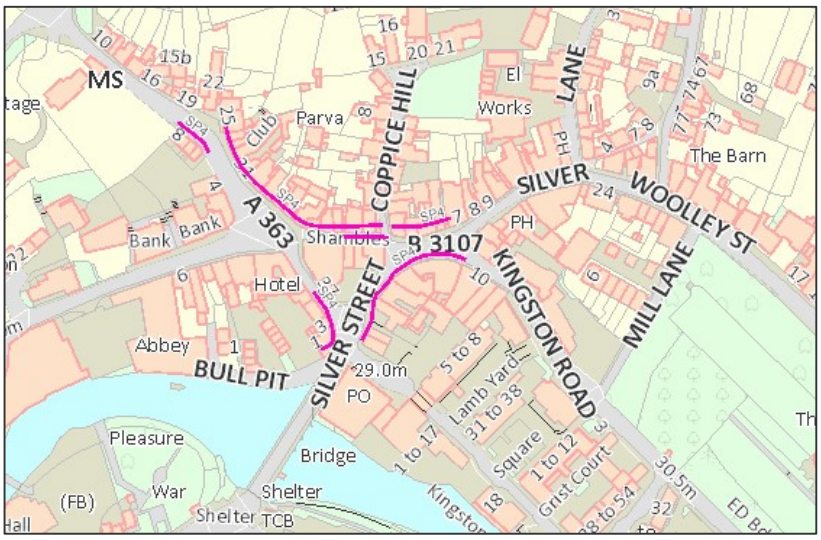
Bradford-on-Avon

Structure

4.25 Bradford-on-Avon is located in West Wiltshire and has a population of 9,402 as per the 2011 census. The town's canal, historic buildings, shops, pubs and restaurants make it a popular destination amongst tourists, whose expenditure will add to the performance of the local economy. The history of the town can be traced back to Roman origins, with the town growing during the 17th century as a consequence of a thriving woollen textile industry. The ancient bridge in the centre of the town remains its natural focus which still retains two of its original 13th-century arches.

4.26 The development plan policies map indicates that the primary retail frontage in Bradford on Avon town centre covers Market Street and its junction with Silver Street (including the Shambles). This boundary is shown in an extract from the development plan policies map in Figure 4.2 below.

Figure 4.2: extract from development plan policies map for Bradford-on-Avon town centre[5]



4.27 Bradford on Avon has a Neighbourhood Plan which was 'made' in 2017. The Plan covers the whole of the Parish and identifies three key areas of opportunity. Two of these are in the town centre and comprise the station car park and St Margaret's Hall car park. The focus for the improvement of these areas is on the public realm and improving linkages with the surrounding area and, in the case of the station car park, improve a gateway into the town centre.

Diversity of Uses

4.28 In order to understand the land use profile of the town centre over the past several years, we have compared data from Experian's survey of the centre in 2012 with AY's updated survey in 2020. The results are contained in Table 4.2 below.

Table 4.2: land use profile of Bradford on Avon town centre

	2012			2020		
	No.	**%**	**UK Ave**	**No.**	**%**	**UK Ave**
Convenience	10	11.2	8.5	10	11.5	10.1
Comparison	36	40.4	41.5	32	36.8	36.7
Service	29	32.6	35.3	33	37.9	39.0
Other	1	1.1	1.1	1	1.1	1.2
Vacant	13	14.1	13.6	11	12.6	13.0
Total	89	100	100	87	100	100

Source: Experian GOAD and Avison Young

4.29 The above data indicates that there has been no material change in the number / proportion of convenience goods retailers in Bradford on Avon town centre over the past several years, and the proportion of units remains slightly above the national average. There has been a drop in the number of comparison goods retailers, from 36 to 32, although this change is in line with the national trend and the proportion of comparison goods retailers

[5] Continuous pink line on plan represents primary retail frontage within town centre

in the centre remains in line with the national average. The number of service uses in the centre has risen slightly and is now (37.9%) just below the national average (39.0%).

Vacancies

4.30 There has been a small decline in the number of vacant units in the town centre between 2012 and 2020 , from 13 to 11, although as a proportion of all surveyed units (12.6%) they remain in line with the national average (13.0%).

Retailer Representation

4.31 As noted above, the proportion of convenience goods stores in Bradford on Avon town centre is slightly above the national average. The largest convenience goods retailer in the centre is Co-op which has a circa 500sq m sales area and sells a modest range of fresh and pre-packaged groceries. In addition to the Co-op there is an off licence, along with a bakery and a couple of grocery/convenience stores. The comparison goods sector in Bradford on Avon is dominated by a large number of local independent niche retailers. The town centre has a relatively high proportion of clothing retailers for a town of this size and there are also a number of arts/crafts/antique stores. The centre has a higher (than national average) proportion of these stores.

4.32 In relation to the provision of service uses, the proportion of food and beverage and health/beauty uses is in line with the national average, whilst the proportion of estate agents in the centre is well above the national average. However, the proportion of banks in the centre is well below the national average.

Customer Views and Behaviour

4.33 The household survey commissioned for this Study provides the following information regarding Bradford on Avon:

- Bradford on Avon lies in Zone 19 and the survey indicates that 53% of first choice main food shopping trips are retained in the town. 50% of this 53% retention is due to the out of centre Sainsburys supermarket, with the town centre Co-op store attracting 2% of first choice main food trips. A similar picture is found in relation to second choice main food shopping trips.
- In relation to top-up food shopping, the retention rate is higher, with 77% of first choice trips from Zone 19 residents retained in the town. The out of centre Sainsburys and Co-op (Winsley Road) attract around 30% of all trips apiece whilst the town centre Co-op has a 14% market share. In relation to second choice top-up food shopping trips, the out of centre Winsley Road Co-op has the highest share (28%) followed by the town centre Co-op (19%) and then Sainsburys (9%).
- With regards to comparison goods shopping, Bradford on Avon generally has a low market share, with, at best, a single digit market penetration rate in most categories. The categories where the town centre has the highest market share are in relation to second choice DIY shopping trips (16%), second choice glassware/tableware/jewellery/watches shopping trips (20%), first choice books/CD/DVD trips (16%) and first choice health and beauty trips (31%).

4.34 The household survey provides the following information regarding leisure patterns associated with Bradford-on-Avon and its residents:

- In relation to usage of health and fitness facilities, 28% of Zone 19 residents who participate in these activities visit Bradford-on-Avon swimming pool, whilst a further 15% of survey respondents gave the generic response of Bradford-on-Avon town centre. In relation to trips from Zone 19 residents outside of Bradford-on-Avon, the following facilities are popular: Bath (10%). Trowbridge (17%) and Melksham (6%).
- Bradford-on-Avon does not have a cinema and the Odeon at St Stephen's Place in nearby Trowbridge unsurprisingly dominates cinema-going trips from Bradford-on-Avon residents with an 82% market share. 12% of cinema-going trips flow to Bath and 3% to Frome.
- For trips associated with food and beverage uses, Bradford-on-Avon attracts a 63% share of evening visits from Zone 19 residents and also attracts 6% of visits from residents of Zone 17 (which includes Trowbridge). Of those evening trips which leave Zone 19, 29% travel to Bath and 3% to Trowbridge. During the daytime, Bradford-on-Avon town centre attracts a 62% of food/beverage trips, with 15% of trips travelling to Bath and 11% to Trowbridge. Bradford-on-Avon town centre also attracts 9% of trips from residents of Zone 17 (Trowbridge) during the day.

Environmental Quality

4.35 Bradford on Avon has one of the most attractive town centres in Wiltshire, situated on both banks of the River Avon. The centre retains many buildings from the 16th, 17th, 18th and 19th centuries, a number of which are of national importance and also provide a considerable amount of visual interest and character to the centre. Much of the town centre's core is formed by densely packed historic buildings which accommodate small retail units at ground floor level and are arranged around narrow winding roads which have in-built traffic calming due to their width. The historic nature of the centre means that pavement widths can be narrow in places, although this does not necessarily detract from the attractiveness of the centre. Maintenance and investment in the built environment across the centre is considered to be good and the continued refurbishment and re-purposing of buildings in the centre continues to maintain and enhance its overall health.

Pedestrian Flows

4.36 During visits to the centre, as part of the preparation of this Study, levels of pedestrian flow were observed. The highest levels of flow were observed to be around either side of the town bridge, including St Margaret's Street, Silver Street, Market Street and Bridge Yard. As noted above, the narrow width of some pavement areas can affect the ease of pedestrian movement in the town centre although this does not appear to be a particular issue in relation to the attractiveness of the centre for visitors.

Occurrence of Crime

4.37 In order to understand the occurrence of crime within Bradford on Avon town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

Accessibility

4.38 Located in the southern part of the town centre, Bradford on Avon's railway station is visited by rail services connecting the town to Bristol, Cardiff, Portsmouth, Warminster, Trowbridge and Southampton. The station is a short walk from the core retail area along Frome Road and St Margaret's Street.

4.39 In relation to bus services, the main bus stops are located on the southern side of the town bridge. These stops are visited regularly by services travelling to Chippenham, Melksham, Trowbridge and Frome.

4.40 Travel to the town centre via private car is assisted by the following off-street parking facilities: Barton Farm (long stay), Bridge Street (short stay), Budbury Place (long stay), Newtown (short stay), St Margaret's (short stay) and parking associated with the railway station.

Conclusions

4.41 Overall, Bradford on Avon is considered to be a healthy town centre. It co-exists alongside nearby centres such as Trowbridge and Bath and has, over many years, found its own niche serving both the day to day needs of the local community and also a wider shopping catchment which is attracted to its niche comparison goods / service offer. Whilst the proportion of vacant retail units in the centre should be kept under close observation, the centre benefits from the very attractive built environment and river-side setting.

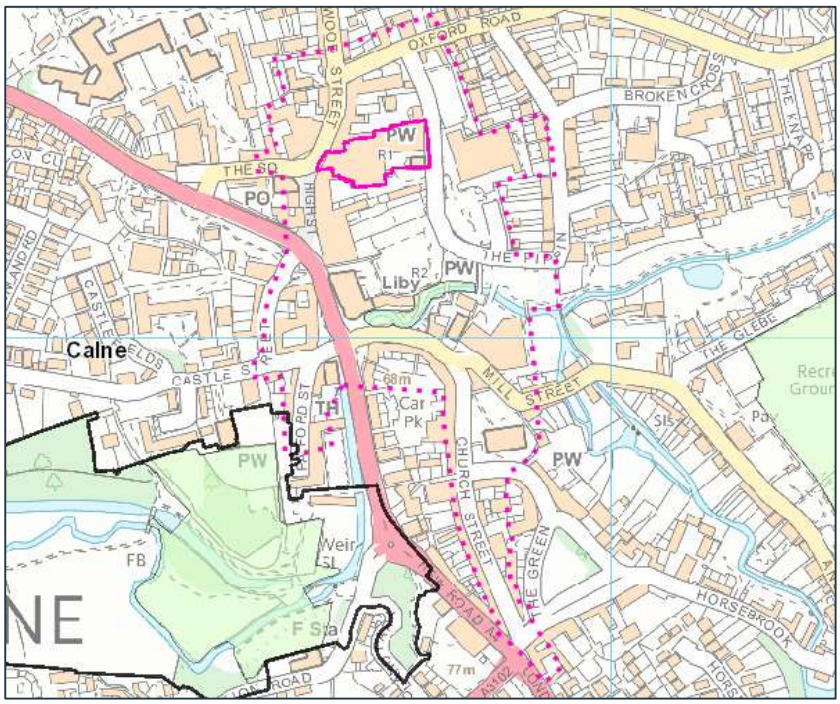
Calne

Structure

4.42 Calne lies in the northern part of Wiltshire and is located to the east of Chippenham and to the south-west of Royal Wootton Bassett. The town lies on the River Marden and is close to the north-western edge of the North Wessex Downs AONB. The town lies at the junction of the A4 and A3102 which link the town to Chippenham. Melksham, Royal Wootton Bassett and Marlborough.

4.43 The development plan policies map provides two boundary definitions for Calne town centre, a primary frontage and a secondary frontage. The primary frontage covers a small area across Phelps Parade whilst the secondary frontage covers the southern end of Wood Street, High Street, The Strand, Church Street, Mill Street, The Pippin and the western end of Oxford Street. Figure 4.3 below provides an extract from the development plan policies map for the town centre.

Figure 4.3: extract from development plan policies map for Calne town centre[6]



4.44 Like a number of other towns in Wiltshire, Calne benefits from a 'made' Neighbourhood Plan. Within the Plan there are two policies relating to the town centre. WS2.1 notes that "*Development proposals within Calne Town Centre must consider, assess and address their impact on the streets, pavements, parking areas and other public spaces and the opportunities provided to improve the quality, accessibility and safety of the public realm and benefit businesses and customers alike*". Policy WS2.2 notes that "*Development proposals within or immediately adjacent to the defined Calne Town Centre must consider and address their relationship to the vision set out in the Calne Town Centre Masterplan (April 2014) and the evolving plans deriving from that. Proposals should demonstrate how they contribute to the Masterplan objectives and dovetail with ambitions for the Town Centre as a whole. In particular, proposals that have the potential to benefit vehicular, pedestrian and cycle movement within the Town Centre, helping to tackle issues identified within the Masterplan, should consider and address opportunities as part of their scheme*".

Diversity of Uses

4.45 Table 4.3 below outlines the land use profile of Calne town centre from the time of the 2012 Study alongside AY's update (in early 2020) of the latest Experian GOAD survey conducted in 2017.

[6] Continuous pink line on the plan represents town centre primary frontage an dotted pink area represents town centre secondary frontage

Table 4.3: land use profile of Calne town centre, 2012 & 2020

	2012			2020		
	No.	%	UK Ave	No.	%	UK Ave
Convenience	8	9.0	8.5	10	11.1	10.1
Comparison	30	33.7	41.5	27	30.0	36.7
Service	37	41.6	35.2	43	47.8	39.0
Other	0	0.0	1.1	1	1.1	1.2
Vacant	14	15.7	13.6	9	10.0	13.0
Total	89	100	100	90	100	100

Source: Experian GOAD and AY

4.46 The data in Table 4.26 above indicates that there has been a small rise in the number of convenience goods retailers in the centre between 2012 and 2020, from 8 to 10. This has meant that the proportion of convenience goods retailers in the centre remains slightly above the national average. In line with the national trend, there has been a decline in the proportion of comparison goods retailers in the centre from 33.7% to 30.0%. There were, at the time of the AY survey in early 2020, 27 comparison goods retailers in the centre. Also, in line with the national average, the proportion of service uses in the town centre has increased from 41.6% to 47.8%. Service uses now occupy almost half of all surveyed units in the town centre.

Vacancies

4.47 Between 2012 and 2020 the number of vacant units in the town centre has decreased from 14 to 9. In 2012, the proportion of surveyed vacant units was 15.7% which was above the comparative national average of 13.6%. At the time of the latest survey, one in ten surveyed units were vacant which is now below the national average of 13.0%. The latest survey shows that all vacancies in the centre are located in the secondary frontage areas. Since the completion of our land use survey earlier in 2020, the Co-op foodstore on Mill Street has closed which will bring the proportion of vacancies closer to the national average.

Retailer Representation & Customer Views and Behaviour

4.48 Up until recently, there were two large foodstores in Calne town centre: Sainsburys and Co-op. However, the Co-op store has now closed, thus reducing the amount of choice for convenience goods provision. The Sainsburys store has a convenience goods sales area of 1,344sq m and sells a wide range of fresh, refrigerated, frozen and pre-packaged food products. The store is served by two adjacent surface level car parking areas and makes an important contribution to the overall health and attractiveness of Calne town centre.

4.49 Bearing in mind the household survey was conducted at a time when the Co-op store on Mill Street was still trading, the household survey results indicate the following in relation to convenience goods shopping:

- Calne lies in Zone 23A of the study area and the survey results indicate that the town, as a whole, is able to attract 70% of first choice main food shopping trips from residents of this zone. It is also able to attract 63% of second choice main food trips, 78% of first choice top-up food shopping trips and 87% of second choice top-up trips. Prior to its closure, the Co-op store had a 5% share of first choice main food trips, 4% of second choice main food trips, and 9% of top-up food shopping trips.

- In relation to the market share of town centre convenience goods stores, the Sainsburys store attracts 27% of all first choice main food trips which is lower than the 38% share of trips for the out of centre Tesco. The Sainsburys store also remains the second most popular second choice main food destination behind the Tesco store. The town centre Iceland store on Phelps Parade also attracts 7% of second choice main food shopping trips from Zone 23B residents.
- In relation to top-up food shopping trips, the town centre Sainsburys has by far the highest market share amongst Zone 23B residents, with 33% of all first choice trips and 28% of second choice trips. The Iceland store on Phelps Parade attracts 5% and 9% of first and second choice trips respectively.

4.50 In relation to comparison goods, it has been noted above that the proportion of comparison goods retailers is below the national average. The proportion of clothing and fashion retailers in the centre (2%) is well below the national average (9%) whilst the proportions of retailers in other comparison goods is much closer to their respective national averages. The household survey results reveal the following regarding comparison goods shopping patterns associated with Calne town centre and the residents of the Calne area:

- Clothing and fashion goods – 4% of first choice trips and 6% of second choice trips
- Furniture, floorcoverings and home furnishings – 4% of first choice trips and 2% of second choice trips
- DIY goods – 3% of first choice trips and 24% of second choice trips
- Domestic appliances - 5% of first choice trips and 3% of second choice trips
- Small electrical goods - 3% of second choice trips
- Glassware/tableware/jewellery/watches - 16% of first choice trips and 14% of second choice trips
- Books, CDs and DVDs - 14% of first choice trips and 16% of second choice trips
- Health and beauty goods – 66% of first choice trips and 48% of second choice trips
- Recreational goods – 17% of first choice trips and 24% of second choice trips.

Environmental Quality

4.51 Almost all of Calne town centre is covered by a designated Conservation Area. The only part of the main retail area in the centre which is not covered by the Conservation Area designation is the Sainsburys supermarket and adjacent parking areas next to The Pippin.

Pedestrian Flows

4.52 During the course of compiling the health check data for this Study, levels of pedestrian vitality throughout Calne town centre have been observed and compared. In line with the existing development plan frontage boundaries, some of the highest levels of vitality can be found along Phelps Parade. Reasonable levels of vitality have also been observed along High Street and between the Sainsburys supermarket (and adjacent parking areas) and Phelps Parade.

Occurrence of Crime

4.53 In order to understand the occurrence of crime within Calne town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

Accessibility

4.54 There are a number of surface car parking areas in Calne town centre including a 77 space facility at Church Street, along with two parking areas to the north and south of the Sainsburys store (50 and 60 spaces apiece) and an area with circa 190 spaces to the south of The Pippin. The Sainsburys car parks are free for two hours for Sainsburys customers whilst the others are pay and display.

4.55 Bus stops in the town centre are located at The Square, New Road and Oxford Road. The stop at The Square (adjacent to the Post Office) is visited by services which travel to Swindon and Royal Wootton Bassett. The stop at Oxford Road is visited by services which travel to Swindon, Royal Wootton Bassett, Lyneham and Chippenham. The stop at New Road is visited by services travelling to Chippenham, Swindon and Devizes.

Conclusions

4.56 Overall, Calne is considered to be a town centre with a localised retail function whose catchment is influenced by the nearby higher order centre of Chippenham. Over recent years vacancies in the centre have been a concern, being above the national average and, although they have been falling, the closure of the Co-op store is a blow to the level of choice in the centre for convenience goods. It is not possible to say whether the recently developed out of centre Tesco store is the primary cause of this closure although the evidence suggests that there has been a material shift in main and top-up food shopping trips away from the town centre alongside the benefit of Tesco in clawing back trips which were being lost to Chippenham.

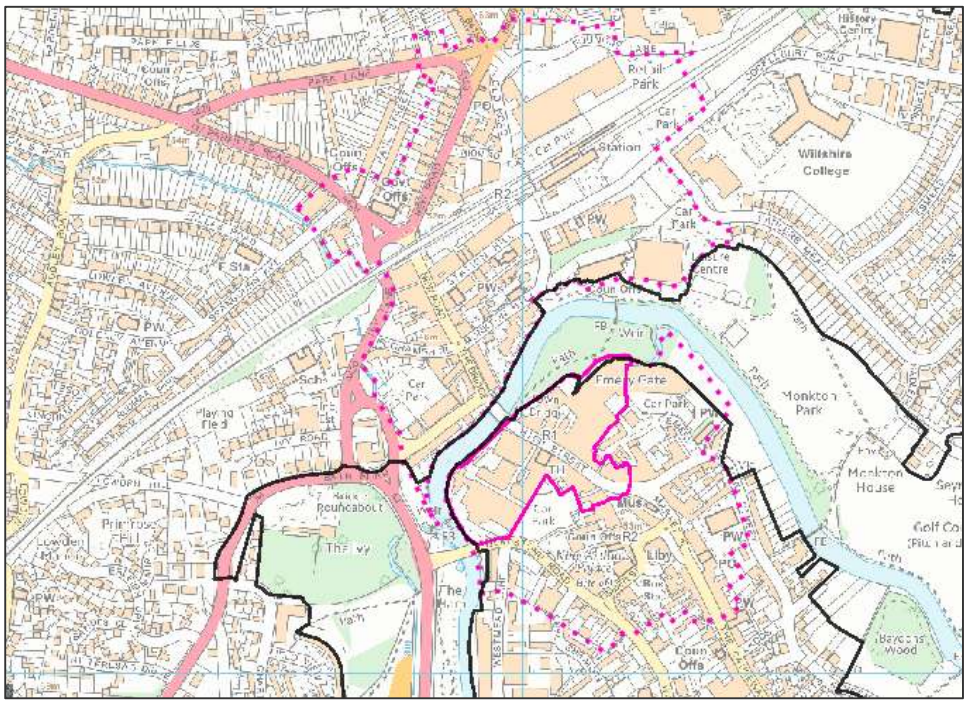
Chippenham

Structure

4.57 Chippenham is one of the three principal settlements in Wiltshire and is located in the northern part of the county. According to the 2011 Census, it has a local resident population of circa 45,000 people and the town is located close to the M4 motorway. Over recent years, the town has grown significantly via new communities such as Cepen Park North and Cepen Park South, and this growth continues with new developments such as Rowden Park on the south-western edge of the town.

4.58 Within the development plan policies map the town centre has two retail frontage definitions: a primary frontage and a secondary frontage. The primary frontage runs along High Street, Borough Parade and the Emery Gate Shopping Centre, whilst the secondary frontage includes Market Place, Timber Street, Gladstone Road, New Road, Station Hill, Hathaway Retail Park and Monkton Hill. Both areas are shown in the extract from the policies map in figure 4.4 below.

Figure 4.4: extract from Wiltshire development plan policies map[7]



Diversity of Uses

4.59 In order to analyse the land use profile of Chippenham town centre over recent years (2012-2020) Table 4.4 below provides data on retail and service uses. The data is gained from recent Experian GOAD surveys plus AY's survey in early 2020.

Table 4.4: land use profile of Chippenham town centre, 2012-2020

	2012			2020		
	No.	**%**	**UK Ave**	**No.**	**%**	**UK Ave**
Convenience	14	5.6	8.5	22	9.0	10.1
Comparison	111	44.2	41.5	98	40.2	36.8
Service	89	35.6	35.2	98	40.2	39.0
Other	7	2.8	1.1	5	2.1	1.2
Vacant	30	12.0	13.6	21	8.6	13.0
Total	251	100	100	244	100	100

Source: Experian GOAD and AY

4.60 The above data indicates that there has been a noticeable increase in the number of convenience goods retailers in the centre over the past several years, from 14 to 22. The proportion of convenience goods retailers remains below the national average although the gap between the two has become smaller. The proportion of comparison goods retailers remains above the national average although the number of such retailers in

[7] Continuous pink line area represents town centre primary frontage whilst dotted pink boundary represents town centre secondary frontage.

the centre has declined in line with the national trend, reducing from 111 in 2012 to 98 in 2020. Comparison goods retailers, however, still occupy circa 40% of all surveyed retail units in the town centre.

4.61 The number of service uses has increased, from 89 in 2012 to 98 in 2020, and service uses now occupy the same proportion units in the centre (40%) as comparison goods retailers. The proportion of service uses in the centre (40%) is now marginally above the national average (39%).

Vacancies

4.62 Over the past several years, vacancies in Chippenham town centre have fallen, from 30 in 2012 to 21 in 2020. Throughout this period the proportion of vacant units in the town centre has remained below the national average. The majority of vacancies can be found along Market Place, St Mary Street, Borough Parade and the Causeway.

Retailer Representation

4.63 Within the convenience goods sector, the largest retailers are Tesco Metro in the Emery Gate, an Iceland on High Street and a Little Waitrose in Borough Parade. Due to their size, these stores are generally orientated towards top-up food shopping and provide an important contribution to the overall role and function of the town centre. Other convenience goods stores include a health food store, bakeries, a convenience store and a greengrocer.

4.64 The comparison goods sector in Chippenham town centre is a mix of national multiples and local independents. Most national multiple retailers can be found in Emery Gate and Borough Parade and along High Street, and include Waterstones, EE, New Look, Clarks, Argos, Poundland, Wilko, Peacocks and Sports Direct. The centre generally has a high than (national) average proportion of most comparison goods businesses including clothing/fashion and household goods.

4.65 The service sector in the centre has a lower than (national) average proportion of food and beverage outlets although it accommodates national multiples such as Café Nero and Costa along with a range local independent traders. The proportion of banks/building societies and estate agents in the centre are above the national average as is the proportion of health and beauty businesses.

Customer Views and Behaviour

4.66 The household survey commissioned for this Study has provided the following information regarding Chippenham:

- Chippenham lies in Zone 22 of the study area and the survey data indicates that convenience goods stores in the town retain circa 79% of all first choice main food shopping trips. A large majority of these trips are associated with stores outside of the town centre, although the Tesco Metro store in the town centre has a 6% share of main food trips. Circa 68% of second choice main food trips are retained in Zone 22 with the Tesco Metro achieving a 7% market share alongside the town centre Iceland (2%) and Little Waitrose (1%). In relation to top-up food shopping, three-quarters of trips from Zone 22 residents are

retained by stores in Chippenham. In relation to first choice top-up trips, the town centre Tesco Metro has an 11% market share, followed by 2% for Iceland and 1% for the Little Waitrose.

- In relation to comparison goods shopping, the household survey results indicate the following market shares for Chippenham:
  - Chippenham lies in Zone 22 of the study area and is able to attract one fifth of first choice clothing/fashion trips from residents living in this zone. Chippenham also attracts one fifth of clothing/fashion trips from Zone 21 (Corsham). Chippenham's market share as a second choice clothing/fashion destination is higher with a 29% share in Zone 22 and 36% in Zone 21.
  - The town has a market share of around one quarter of shopping trips for furniture, floorcoverings and household textiles in Zones 21 and 22 although additional expenditure is drawn from Zones 20 and 23a.
  - Chippenham has a very high market share for DIY/hardware shopping trips in the local area. The town, primarily due to the B&Q store on Bath Road, retains 90% of trips in Zone 22, 85% of trips in Zone 21 and 75% of trips in Zone 23a.
  - Chippenham retains around half of all trips amongst Zone 22 residents for electrical goods, homewares and recreational goods. The town also retains three quarters of first choice shopping trips for health and beauty goods.
  - The household survey also ascertained how residents of Zone 22 utilised Chippenham town centre. The results indicate that 18% of local residents use the centre for non-food shopping but only 8% visit the centre for food shopping. A high percentage of local residents (40%) visit the centre for window shopping / browsing, whilst 30% visit the centre for financial services and 23% for health/beauty goods.

4.67 In relation to leisure uses, the household survey provides the following information:

- The Reel cinema on Marshfield Road attracts a 64% market share amongst Zone 22 residents. This cinema also attracts a 15% share of trips from Zone 20 (Melksham), 41% from Zone 21 (Corsham) and 36% from Zone 23A (Calne). In relation to trips lost from Zone 22, these travel to a mixture of Bath, Swindon, Trowbridge and Bristol (The Venue at Cribbs Causeway).
- For trips out in the evening for eating and drinking, 57% of Zone 22 residents regularly visit Chippenham town centre. The town centre also attracts 5% of trips from Zone 20, 8% from Zone 21 and 16% from Zone 23A. For daytime eating and drinking trips, Chippenham town centre attracts 60% of trips from Zone 22 residents, alongside 31% from Zone 21, 23% from Zone 23A and 10% from Zone 23B (Royal Wootton Bassett). This indicates that Chippenham's food and beverage uses are more popular during the day than in the evening.
- In relation to the usage of health and fitness facilities, the most popular facility amongst Zone 22 residents is the Olympiad Leisure Centre at Sadlers Mead. This has a 54% of all trips from those Zone 22 residents that use health and fitness facilities and provides a wide offer including a gym, swimming pool, sports hall and spaces for various types of fitness classes. It is also notable that 22% of Zone 22 residents also use the Springfield Leisure Centre in Corsham. The Olympiad Leisure Centre has a limited draw beyond Zone 22, with 8% of trips from Zone 21 residents and 3% of trips from Zone 23A residents.

- For visits to cultural facilities, events and destinations, the survey results show that Bath city centre is the most popular destination with a 44% share of trips, followed by London (16%) and Swindon (8%). Bristol city centre also attracts 25% of trips from Zone 22 residents. Apart from a small 5% market share for Lacock Abbey, Chippenham town centre does not feature as part of the survey results.

Environmental Quality

4.68 Chippenham town centre has a varied mix of building styles, with the area to the south of the river accommodating a higher proportion of more historic buildings. All of the town centre lies within a Conservation Area and the overall standard of the built environment in the centre is good. Within the primary shopping area there is a varied mix of property styles including 2-3 terraced properties along High Street. This part of the centre is characterised by reasonably narrow streets with High Street semi-pedestrianised thus creating an attractive environment for town centre visitors.

4.69 To the north of the river the majority of the buildings are post-war and vary in terms of their architectural quality. The presence of a greater number of vehicles detracts from the overall attractiveness of this part of the centre although it is able to still able to provide a positive contribution to the overall attractiveness of the town centre. Pedestrian movement in this part of the centre is affected by the dominance of the highway infrastructure affects ease of movement in this part of the centre.

Pedestrian Flows

4.70 The highest level of pedestrian flow observed during our visits to Chippenham town centre was along High Street, which matches the primary shopping frontage definition in the development plan. Equally strong flows were also observed within the Emery Gate and Borough Parade shopping areas whilst linkages across the River Avon towards New Road were also high (aided by the presence of the Bath Road car park). Pedestrian flows to the north of the River Avon along New Road and links to Hathaway Retail Park are also reasonably strong.

Occurrence of Crime

4.71 In order to understand the occurrence of crime within Chippenham town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

Accessibility

4.72 Located in the southern part of the town centre, Chippenham's bus station on Timber Street is visited by a number of regular bus services connecting the town to Devizes, Hullavington, Trowbridge and Swindon. In addition, there are also bus stops on Gladstone Road, New Road and Bath Road which are visited by services traveling to and from Castle Combe, Corsham Royal Wootton Bassett and Bristol, along with longer distance cross-country services to, for example, London.

4.73 Chippenham town centre also benefits from a railway station which is located in the northern part of the town centre. The station is located on the Great Western line and is therefore visited by regular services linking the town to Bath, Swindon, Bristol, Reading and London Paddington.

4.74 In relation to access to Chippenham town centre via private car, the centre has the following off-street parking facilities:

- Bath Road – 233 spaces
- Borough Parade – 195 spaces
- Brakemead – 22 spaces
- Emery Gate – circa 300 spaces
- Gladstone Road – 38 spaces
- Monkton Park – 90 spaces
- Spanbourn Avenue – 44 spaces
- Wood Lane – 67 spaces

Conclusions

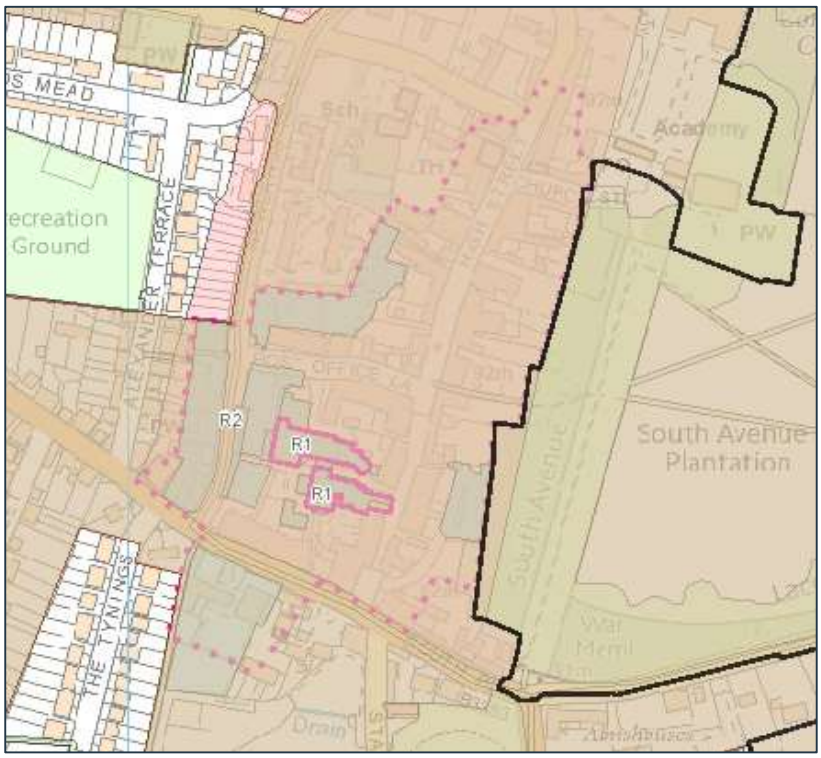
4.75 Chippenham remains a healthy town centre, which has been able to adapt to the on-going trends facing the UK retail sector and also the changes in out of centre floorspace in the town. The town centre has seen falling vacant retail units alongside changes to the comparison goods and service sectors, which have mirrored the national trend. Given the growing amount of foodstore floorspace outside of the town centre, the centre will increasingly concentrate upon top-up food shopping trips and there is a need to ensure that the High Street and the two purpose built shopping areas (Emery Gate and Borough Parade) continue to underpin the health of the centre.

Corsham

Structure

4.76 Corsham lies a short distance (4 miles) to the west of Chippenham. It lies on the A4 which links Bath to Chippenham and is home to the Ministry of Defence which has a large campus on the south-western edge of the town. The town centre in Corsham lies on the eastern edge of the settlement and comprises High Street and the Martingate Centre. The development plan policies map shows two separate defined boundaries: a primary frontage and a secondary frontage. The primary frontage is confined to the Martingate Centre which is a post-war pedestrianized shopping centre. The secondary frontage extends although High Street from its junction with Pickwick Road in the south to its junction with Priory Street in the north. It also includes Post Office Lane, the southern part of Newlands Road and a small part of Pickwick Road. An extract from the development plan policies map is shown in Figure 4.5 below.

Figure 4.5: extract from development plan policies map for Corsham town centre[8]



4.77 Corsham is also subject to a 'made' Neighbourhood Plan (November 2019) which covers the whole of the town and the surrounding rural area. Policy CNP BE4 includes reference to the town centre and notes that employment related development which contributes to the revitalisation of Corsham town centre in accordance with the Framework Masterplan will be supported. Proposals should seek opportunities to: enhance/remodel the Martingate Centre, integrate coach parking, develop a new supermarket (with mixed use opportunities), identify start-up employment within development proposals, remodel/enhance the town centre car parks, and create linkages between key commercial locations.

Diversity of Uses

4.78 Experian undertake surveys of Corsham town centre for their GOAD plan database. Table 4.5 below outlines the retail and service land use profile of the centre from the time of the previous study (2012) and also AY's update the latest Experian survey in early 2020.

[8] Continuous pink line boundary represents the town centre primary frontage area. Dotted pink boundary represents the town centre secondary frontage.

Table 4.5: retail and service land use profile of Corsham town centre, 2012-2020

	2012			2020		
	No.	%	UK Ave	No.	%	UK Ave
Convenience	8	10.4	8.5	9	11.1	10.1
Comparison	36	46.8	41.5	31	38.3	36.7
Service	31	40.3	35.2	30	37.0	39.0
Other	2	2.6	1.1	2	2.5	1.2
Vacant	1	1.3	13.6	9	11.1	13.0
Total	77	100	100	81	100	100

Source: Experian GOAD and AY

4.79 The above data indicates that there has been a small rise in the number of convenience goods retailers in the centre, from 8 in 2012 to 9 in 2020. The proportion of convenience goods retailers remains above the national average although the difference between the two has narrowed over the past several years. In line with the national trend the number and proportion of comparison goods retailers in the town centre has decreased, from 36 units in 2012 to 31 in 2020. Whilst the difference between the proportion of comparison goods retailers and the national average has narrowed between 2012 and 2020, the proportion of comparison goods retailers remains slightly above the national average. The number of service uses in the centre has now changed significantly over the past several years which has meant that the proportion of service uses (37%) has now fallen below the national average of 39%.

Vacancies

4.80 Over the past several years there has been a noticeable increase in the number of vacant units in Corsham town centre. At the time of the 2012 land use survey there was only one vacancy. However, this has now risen to nine vacancies and, whilst remaining below the national average, is a potential sign of a falling demand for commercial floorspace in Corsham. Vacancies are spread across the town centre including some large units. Vacancies account for some 1,600sq m of floorspace in the town centre which is equivalent to some 15.6% of all surveyed retail and service floorspace, above the national average of 12.2%.

Retailer Representation & Customer Views and Behaviour

4.81 Within the convenience goods retail sector the largest retailer in the town centre is Co-op. This store is located in Martingate, selling a reasonably wide range of fresh and pre-packed food products along with a modest range of beers, wines and spirits. The Co-op store lies adjacent to a large surface level car park with provision for circa 60 vehicles. Corsham lies in Zone 21 of the study area and the household survey results indicate that the town centre attracts 6% of first choice main food shopping trips from residents of this zone, along with 5% of second choice main food trips. In relation to top-up food shopping, the town centre attracts a 38% share of first choice trips and a 29% share of second choice trips. Within the convenience goods retailer sub-categories, Corsham town centre has an above average proportion of bakery, butcher and greengrocer stores.

4.82 In relation to comparison goods shopping, the household survey results indicate the following market shares amongst Zone 21 residents:

- Clothing and fashion goods – 6% of first choice trips
- Furniture, floorcoverings and home furnishings – 5% of first choice trips
- DIY goods – 15% of second choice trips
- Glassware, tableware, jewellery, watches – 6% of first choice trips and 14% of second choice trips.
- Books, CDs, DVDs- 17% of first choice trips and 18% of second choice trips
- Health and beauty goods - 34% of first choice trips and 17% of second choice trips
- Recreational goods – 4% of first choice trips

4.83 Within the leisure sector, the household survey results reveal the following local leisure usage patterns amongst Zone 21 residents:

- Due to its size Corsham unsurprisingly does not possess a permanent cinema and local residents in Zone 21 visit the following destinations: Chippenham (42% share), Bristol (10% share), Bath (13% share) and Trowbridge (12% share).
- In relation to visits to food and beverage outlets, the survey results indicate that 37% of local residents visit Corsham town centre in the evenings, with 29% of local residents also travelling to Bath city centre. 8% of local residents also travel to Chippenham town centre in the evenings. During the daytime, Corsham is a slightly less popular destination then competing destinations such as Bath and Chippenham. Corsham has a 25% market share in the local area, compared with 31% for Chippenham and Bath apiece.
- In relation to visits to health and fitness facilities, Springfield Leisure Centre has the highest market amongst Zone 21 residents at 69%. The Olympiad Leisure Centre in Chippenham has an 8% share of trips amongst Zone 21 residents.

Environmental Quality

4.84 All of Corsham town centre lies within the defined Conservation Area in the town. High Street is a very attractive street. It is a narrow street with a one-way highway which is bordered on both sides by a series of two and three storey terraced buildings. Pavement areas along High Street are generally narrow although the southern end the High Street is pedestrianized creating a more relaxed pedestrian environment. Martingate is also an extension to the pedestrianised area, linking the southern end of High Street to the Co-op foodstore and the surface level car park off Newlands Road.

Pedestrian Flows

4.85 During our visits to Corsham town centre as part of preparing this Study, levels of pedestrian flow across the centre were observed. In line with the primary frontage definition in the development plan policies map the areas with the highest levels of pedestrian vitality are along Martingate and the southern part of High Street. Ease of pedestrian movement around this area is aided by the car-free nature of the environment.

Occurrence of Crime

4.86 In order to understand the occurrence of crime within Corsham town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

Accessibility

4.87 There are four main off-street car parks in Corsham. These are High Street (maximum stay 3 hours, with 35 spaces), Newlands Road (87 spaces), Post Office Lane (118 spaces) and Springfield Leisure Centre (87 spaces). The main bus stops in Corsham town centre are located on the western and southern parts of the centre, on Newlands Road and Pickwick Road. These stops are visited by bus services which travel to and from Bath, Box, Chippenham and Melksham.

Conclusions

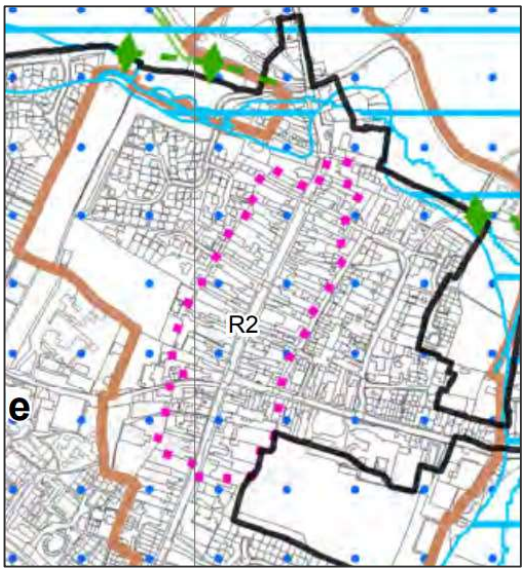
4.88 With regards to the preceding analysis, Corsham town centre performs a localised retail and service function. The convenience goods offer of the centre has remained constant over the past several years, continuing to focus upon primarily a top-up food shopping role, with main food shopping trips by local residents primarily flowing to nearby Chippenham. The role and function of the centre is clearly influenced by nearby Chippenham and the rise in vacancies in the centre over the past several years should be monitored by the Council going forwards.

Cricklade

4.89 Cricklade lies on the northern edge of the county of Wiltshire, to the north-west of Swindon and to the south-east of Cirencester. The defined retail area lies along High Street in the northern part of the settlement and is linear in form. Retail and service uses are housed in two and three storey terraced and semi-detached buildings along a relatively narrow street which includes on-street parking.

4.90 The defined retail area is shown in Figure 4.6 below.

Figure 4.6: extract from Wiltshire policies map for Cricklade[9]



[9] Cricklade has a secondary frontage area represented by the dotted pink boundary shown in the figure above.

4.91 Avison Young have undertaken a survey of retail and service uses in the centre in early 2020 and the results are contained in Table 4.6 below.

Table 4.6: land use profile of Cricklade town centre

	2020		
	No.	**%**	**UK Ave**
Convenience	5	17.2	10.1
Comparison	9	31.0	36.7
Service	14	48.3	39.0
Other	0	0.0	1.2
Vacant	1	3.5	13.0
Total	29	100	100

Source: Avison Young

4.92 Our land use survey indicates that Cricklade has a high proportion of convenience goods and service uses, which are both well above their respective national averages. The convenience sector includes a Tesco Express store along with two butchers and a delicatessen. The service sector includes a number of take-aways / restaurants, two estate agents, hair salons / barbers and two cafes. There is only one vacancy in the centre which indicates that there is a good level of demand for premises in the centre of Cricklade.

4.93 The household survey commissioned for this Study indicates that convenience goods stores in Cricklade (which lies in Zone 25 of the study area) gain all of their turnover from top-up food shopping trips associated with residents of Zone 25. Stores attract 5% of first choice top-up trips and 26% of second choice top-up trips. Cricklade does not attract any food shopping trips from any other zones in the study area. In relation to comparison goods shopping trips, Cricklade does not, understandably, achieve any noticeable market share across most goods categories. The only category where the town achieves a high market share is in relation to health and beauty goods where is attracts 36% of first choice trips and 15% of second choice trips.

4.94 Bus stops in Cricklade town centre are located on Calcutt Street and are visited by services which travel to and from Swindon, North Cerney, South Cerney and Cirencester. In addition to the on-street parking along High Street, the main off-street car park is located adjacent to the Town Hall and has 34 spaces.

4.95 Cricklade also has a 'made' Neighbourhood Plan (2018). It covers the Parish and has three policies relating to the town centre. Policy B1 relates to the defined primary shopping area and indicates that Class A1 retail uses will be promoted in this area. Policy B2 relates to the defined town centre area and indicates that, within this area, proposals for Class A1-A4 retail, leisure and cultural uses will be supported. There is also support for proposals which promote tourism. Policy B3 identifies the police station site as a redevelopment opportunity, with ground floor Class A1-A5 retail frontages.

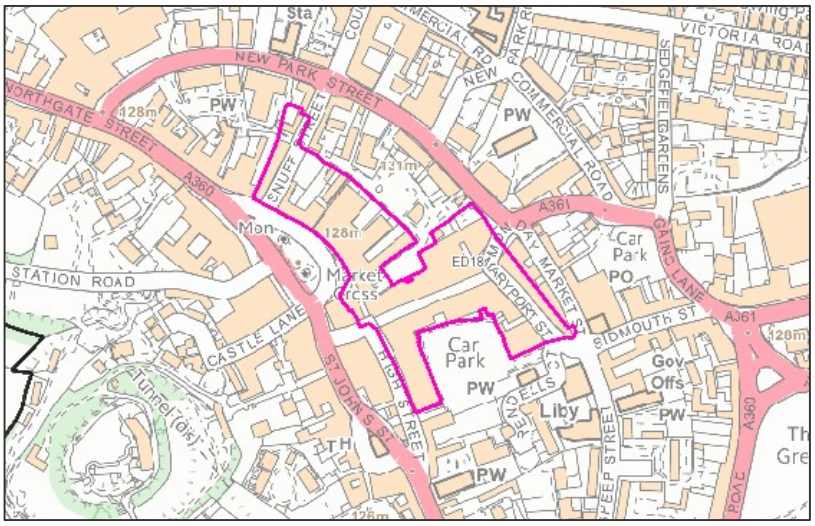
4.96 Overall, Cricklade is one of the smallest main town centres in Wiltshire but is considered to be a healthy and attractive town centre. There is, like many other smaller centres, a heavy emphasis towards service uses and top-up food shopping trips, with a limited catchment which is influenced by the surrounding larger settlements of Swindon, Malmesbury and Cirencester.

Devizes

Structure

4.97 Devizes town centre is situated in central Wiltshire, 10 miles south east of Chippenham and 11 miles east of Trowbridge. The town is located on the A361 linking the town with Trowbridge and the A342 to Chippenham. The development plan policies map defines the prime shopping area in the town as the eastern side of Market Place, the Brittox, High Street and Maryport Street. These boundaries are shown in Figure 4.7 below.

Figure 4.7: extract from development plan policies map for Devizes town centre[10]



4.98 The Devizes Neighbourhood Plan was 'made' in 2015. The Plan makes brief references to the town centre and indicates that priority should be given to the re-use of previously developed town centre sites to help with localised regeneration.

Diversity of Uses

4.99 Table 4.7 below outlines the retail land use profile of Devizes town centre over the past several years. This data is drawn from recent Experian GOAD surveys along with AY's survey of the centre in early 2020

Table 4.7: retail and service land use profile in Devizes town centre, 2012-2020

	2012			2020		
	No.	**%**	**UK Ave**	**No.**	**%**	**UK Ave**
Convenience	18	8.4	8.5	20	9.4	10.1
Comparison	109	50.7	41.5	97	45.8	36.7
Service	72	33.5	35.2	78	36.8	39.0
Other	3	1.4	1.1	2	0.9	1.2
Vacant	13	6.0	13.6	15	7.1	13.0
Total	215	100	100	212	100	100

Source: Experian GOAD and AY

[10] The prime shopping area in Devizes town centre is represented by the continuous pink line in the plan above

4.100 Over the past eight years the retail land use profile in Devizes town centre has followed both the national trend and also many other town centres across Wiltshire. There has been a small rise in the number of convenience goods retailers in the centre and the proportion of these retailers remains close to the national average. The number of comparison goods retailers has declined by 12 between 2012 and 2020 although the proportion remains well above the national average. Service uses have risen by 6 units over the past eight years but remain slightly below the national average.

Vacancies

4.101 The number of vacancies has risen slightly over the past eight years, from 13 to 15, although the proportion of vacant units in the town centre (7.1%) remains well below the national average of 13%, suggesting that there is a good demand for retail premises in Devizes. The areas where most vacancies can be found are along Market Place, High Street and St Johns Street.

Retailer Representation

4.102 Within the convenience goods retail sector, the three largest retailers are Morrisons, Sainsburys and Iceland. The Morrisons store lies on the eastern edge of the centre and has a convenience goods sales area of circa 1,900sq m net, selling a wide range of fresh and pre-packaged convenience goods. The store is served by an adjacent surface level customer car park which is free for customers of the store for two hours. The Sainsburys store lies at the junction of Monday Market Street and Sidmouth Street. It has a convenience goods sales area of circa 400sq m net and lies adjacent to a surface level car parking accessed from Gains Lane. The Iceland frozen foods store lies on The Brittox. The store extends to circa 350sq m net and does not have a dedicated car park although it is in easy walking distance of the car park on New Park Street. In relation to other convenience goods stores, the town centre has several bakeries, two butchers, an off-licence, a greengrocer and a number of newsagents.

4.103 Within the comparison goods sector the highest concentration of national multiple retailers can be found along The Brittox and Market Place, including WH Smith, Marks and Spencer, Clarks, M&Co and Superdrug. As noted above, the proportion of comparison goods retailers in the centre is higher than the national average with higher than average proportions of homeware/furniture and sporting/recreational goods retailers. Within the service sector, there is a lower than (national) average proportion of food and beverage retailers and lower than average proportion of estate agents. However, the proportion of health and beauty and financial establishments are above their respective national averages. National multiple food and beverage retailers include Pizza Express, Costa Coffee, and Café Nero.

4.104 In addition to the permanent range of retail businesses, the town centre hosts a weekly outdoor market on a Thursday and there is also an indoor market on the Shambles open every day except Wednesdays.

Customer Views and Behaviour

4.105 The household survey commissioned for this Study provides the following information about the usage of Devizes town centre:

- Devizes lies in Zone 15 of the study area and the survey results indicate that the town is able to retain 71% of first choice main food trips from this area. The town centre Morrisons has a 43% market share, followed by a 14% share for the town centre Sainsburys. Devizes town centre also draws a reasonably large amount of trade from Zone 14 (Pewsey).
- The town also retains 66% of second choice shopping trips with the out of centre Lidl store gaining the largest share (23%) followed by Morrisons (20%) and Sainsburys (16%). Devizes also attracts one quarter (25%) of second choice trips from Zone 14 residents.
- 81% of first choice top-up food shopping trips from Zone 15 residents are retained by Devizes, with the market shares of the main stores as follows: Morrisons (22%), Iceland (4%), Lidl (9%), Sainsburys (20%) and other stores in the town centre (10%).
- In relation to comparison goods shopping Devizes is able to attract the following market shares for first choice shopping trips:
    - Clothing and fashion goods – 18%
    - Furniture, floorcoverings and household textiles – 24%
    - DIY goods- 86%
    - Electrical goods – 4%
    - Glassware, tableware, jewellery and watches – 11%
    - Books, CDs and DVDs – 39%
    - Health and beauty goods – 86%
    - Recreational goods – 42%
    - Gardening goods – 66%

Environmental Quality

4.106 The townscape quality of Devizes is exceptionally high and is dominated by the castle on the western side of the centre. The centre is characterised by long street frontages of historic buildings and well-defined urban spaces, particularly the Market Place. There are over 500 listed buildings in the town. The Market Place is the focus of the town and is an especially attractive space almost completely surrounded by historic buildings, a number of which are also of considerable architectural interest. The buildings are mostly three storeys in height giving a pleasing uniformity to this part of the town, although dates of construction and building materials vary creating interest within the overall picture. In Devizes more than in other towns in Wiltshire the historic street lines are an essential part of the character of the town and the relationship between the buildings and the pavements is particularly important. The relationship between the height of buildings and width of the street determines the character of the spaces between. Narrow streets with relatively tall buildings such as The Brittox and Wine Street have a distinct sense of enclosure, especially where the end views are contained by buildings.

Pedestrian Flows

4.107 Visits to the centre during the course of completing this Study have observed that the highest levels of Sidmouth Street, the Brittox and Market Place. The pedestrianized nature of the Brittox clearly assists with the ease of

pedestrian movement in this part of the town centre and provides an attractive and relaxed environment. Other streets in the centre accommodate traffic alongside pavement areas, which are generally narrow given the historic nature of the centre. However, whilst the pavement areas are narrow, the quality of the public realm is very good which adds to the overall attractiveness of the centre.

Occurrence of Crime

4.108 In order to understand the occurrence of crime within Devizes town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

Accessibility

4.109 Car parking provision in Devizes town centre can be found in the following locations:

- Castle Grounds – 14 spaces
- Central – 162 spaces
- Couch Lane – 13 spaces
- Market Place – 77 spaces
- Northgate – 33 spaces
- Sainsburys – 122 spaces
- Sheep Street – 39 spaces
- Station Road – 226 spaces
- The Wharf – 106 spaces
- Vales Lane – 26 spaces
- West Central – 56 spaces

4.110 In relation to public transport, the majority of bus stops are located in the Market Place with additional stops on Sidmouth Street, Estcourt Street and New Park Street. Bus services visiting these stops link the town to Pewsey, Trowbridge, Swindon, Melksham and Chippenham.

Conclusions

4.111 Overall, Devizes is considered to be a healthy town centre with a limited but strong catchment area. The centre is able to attract a large majority of main and top-up food shopping trips from residents of the town centre and the surrounding area, along with a reasonable amount of food shopping trips from Pewsey. The town centre also has a strong market penetration rate for a settlement of its size and the overall quality of the built environment no doubt adds to the overall attractiveness of the town centre.

Downton

4.112 Downton is classified as a local service centre in the current development plan and is located to the south of Salisbury in the very southern part of Wiltshire. The village is split into three separate areas interspersed with cottages and countryside. Retail and service provision in the centre is distributed throughout, with key areas including The Headlands (A338), The Borough and High Street. The development plan policies map does not define any 'town centre' or primary shopping area boundaries.

4.113 The village comprises mainly independent retailers and services, however the largest unit is a small Co-op food store located on The Borough. AY's survey of the centre in early 2020 recorded 12 retail and service uses across the village. These include three convenience stores, six comparison goods stores and three service outlets.

4.114 Downton has a 'made' Neighbourhood Plan (2017) which covers the Parish of Downton. The Plan has a section on the local economy and Policy LE2 deals with retail uses, noting that "*Planning applications for the development of new or extended retail facilities to serve local needs within the Plan area will be supported where they have no unacceptable negative impacts on the residential amenity of the locality concerned or the safe and free flow of traffic on the highway network*". The Plan also notes that the number of retail outlets and facilities in the village has reduced over the past few years.

4.115 The household survey commissioned for this Study indicates that:

- The Co-op store on The Borough attracts 2% of first choice main food trips and 1% of second choice from residents of Zone 3 of the study area. It also attracts 7% and 6% of first choice top-up trips from Zones 3 and 4 respectively.
- Given the size and retail offer of Downton it is unsurprising that the village does not register any market share data in terms of comparison goods shopping trips.

4.116 Retail and service provision is divided into three distinct areas in Downton, which are linked by residential areas. The High Street in the east of the village is characterised by traditional brick built buildings and thatched cottages, providing a mixture of comparison, convenience and service uses. The environment is of a high quality and is well maintained, and is separated from the other retail provision by the River Avon which runs from north to south. In the centre of the village is The Borough, in which the Co-op food store and several other convenience and service units are located. These units are a combination of traditional brick buildings, as well as more modern units. A zebra crossing at this location improves access between shops for pedestrians. There is attractive planting, benches and bins in this location. Further west is the Headlands which is a less attractive area than the rest of the village, in part due to the loss of character due to the busy A338 which runs along this road.

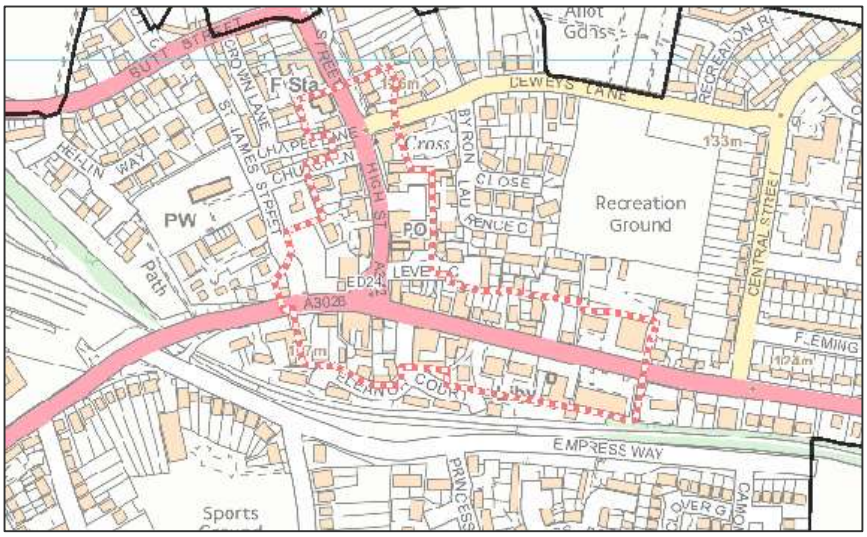
4.117 Downton is located adjacent to the A338, connecting Fordingbridge, Ringwood and Bournemouth in the south to Salisbury further north. This is a key route for traffic into Salisbury and at times is very busy. Parking is available on street, and approximately 17 designated spaces are allocated outside the Co-op food store, and a larger car park to the rear with space for 50 vehicles. A specific bus service between Downton and Salisbury runs approximately every 90 minutes with the X3 between Salisbury, Fordingbridge, Ringwood and Bournemouth and stopping at Downton running every 30 minutes at peak times.

4.118 Overall, Downton serves a localised function in the southern part of Wiltshire. It concentrates upon serving the top-up food shopping needs of local residents along with day-to-day service needs. It is an attractive 'centre' although retail and service uses are dispersed throughout the settlement making it difficult to define a single central focus for the development plan policies map. As a consequence, it is our recommendation that the assessment of proposals which may have an impact upon the retail/service function of Downton will need to consider whether the overall function of the settlement will be affected.

Ludgershall

4.119 Ludgershall lies in the southern part of Wiltshire in close proximity to Salisbury Plain. The town has long been associated with the nearby military establishments on Salisbury Plain. The defined retail area, as outlined in the development plan, extends along High Street and Andover Road with the latest land use pattern in this area outlined in Figure 4.8 below.

Figure 4.8: extract from development plan policies map for Ludgershall town centre[11]



4.120 Experian GOAD do not undertake surveys of Ludgershall so AY has undertaken its own survey of retail and service uses in the centre in early 2020. The survey has classified retail and service uses in the centre in the same way as a standard Experian GOAD 'centre' report. The data collected by the survey is summarised in Table 4.8 below.

[11] The service centre boundary in Ludgershall is represented by the dotted pink and white boundary in the plan above.

Table 4.8: retail and service land use profile of Ludgershall town centre

	2020		
	No.	**%**	**UK Ave**
Convenience	5	21.7	10.1
Comparison	2	8.7	36.7
Service	13	56.5	39.0
Other	1	4.3	1.2
Vacant	2	8.7	13.0
Total	23	100	100

Source: Avison Young survey

4.121 The main convenience goods retailers in the centre are located on Andover Road and comprise a Co-op and a Tesco Express store. There is also a Spar convenience store providing further convenience goods, along with a butcher and a newsagent. Convenience goods retailers within the defined retail area in the centre occupy around one fifth of all surveyed units which is twice as high as the national average.

4.122 Ludgershall lies in Zone 11 of the study area for the household survey and the survey results indicate that it is able to attract circa 5% of first choice main food trips and 4% of second choice main food trips. Given the size of the convenience goods stores in Ludgershall it is unsurprising that there is a higher market share amongst top-up food shopping trips amongst Zone 11 residents with a 30% share of first top-up shopping trips.

4.123 Ludgershall has a very limited comparison goods retail offer which comprises only two businesses, making up just circa 9% of all surveyed units. This is well below the national average of 36.7%. Retailers include an independent cycle shop and a car repairs garage. The available household survey data indicates that Ludgershall has a minimal / zero market share across most categories except for health and beauty goods where is has a 26% share of first choice trips from Zone 11 residents and a 10% share of second choice trips.

4.124 The service retail sector is by far the largest sector in the defined centre boundary with circa 56% of all surveyed units. Businesses include two estate agents, three hairdressers/beauticians, two public houses, five takeaways/restaurants, a tanning salon, a café and a solicitors. The majority of service units are located on the High Street and Tidworth Road.

4.125 With regards to the accessibility characteristics of Lugdershall, the main bus stops are located along Andover Road and Tidworth Road. These stores are visited by bus services which travel to Amesbury, Tidworth and Andover. Car parking in the centre can be found on street along High Street plus small car parks associated with the Co-op and Tesco Express stores and a small parking area adjacent to St James Street.

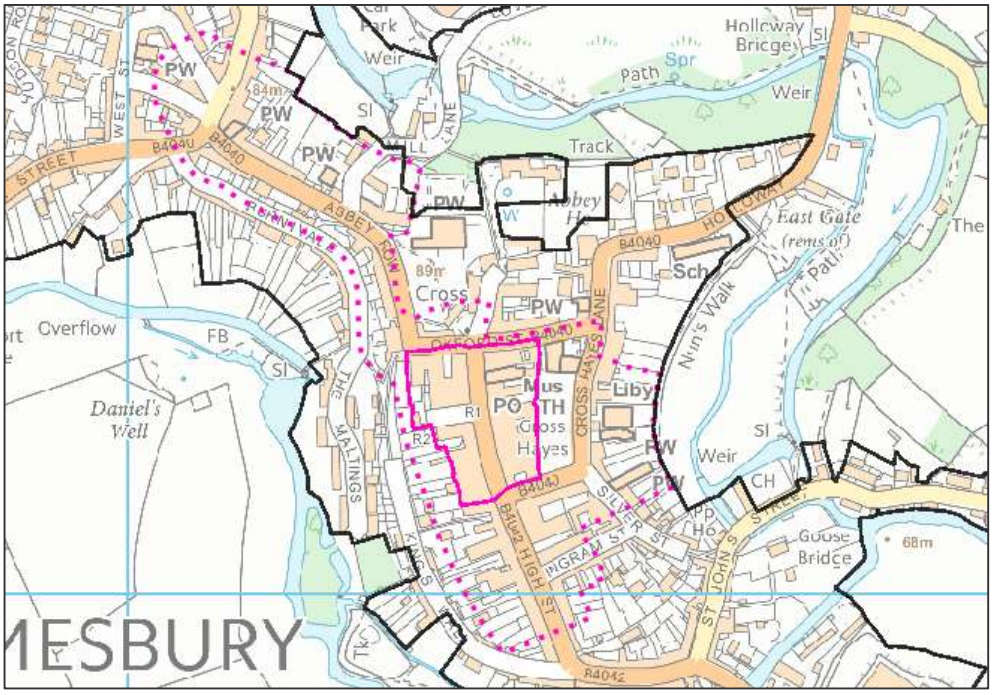
4.126 Ludgershall is, in our opinion, very much focused around a day-to-day top-up food shopping and service role. It performs this role well and compliments the larger main food shopping role of nearby Tidworth. It has experienced a large amount of new residential development in recent years, particularly associated with armed forces accommodation. There is planning permission for a considerable amount of additional residential accommodation which will help to support existing floorspace.

Malmesbury

4.127 Malmesbury lies in the northern part of Wiltshire close to the southern edge of the Cotswolds. The town was founded in the Middle Ages and its most iconic building is the Abbey which lies adjacent to Gloucester Street and Abbey Row. The town is also famous for being home to one of Dyson's manufacturing plants.

4.128 The development plan policies map defines primary and secondary retail frontage areas. The primary retail frontage area is relatively small, covering both sides of the High Street between St Dennis Lane and Oxford Street. The secondary frontage area includes the southern part of High Street, Abbey Road, Ingram Street and Silver Street. These boundaries are shown in Figure 4.9 below.

Figure 4.9: extract from development plan policies map for Malmesbury town centre[12]



4.129 In recent years there has been a number of proposals for foodstores in Malmesbury. Around the time of the previous study there were proposals by Waitrose and Sainsburys for large supermarkets. The Sainsburys application was refused and the Waitrose application was approved. The Waitrose store has now been constructed and is trading and lies a reasonable walking distance to the east of the town centre. More recently there have been applications from ALDI and Lidl for foodstores in the town. The Lidl proposal related to a greenfield site close to the Waitrose store and has been refused. The ALDI proposal was subject to the same site as the previous Sainsburys proposal and has received a resolution to grant planning permission.

4.130 The Malmesbury Neighbourhood Plan was 'made' in February 2015 and Section 3 of the document deals with shopping and the town centre. Reference is made to the Waitrose supermarket development with Policy 10 noting that planning permission will be granted for an additional supermarket only if four economic conditions are met: (A) no damage to the health of Malmesbury town centre; (B) an enhancement to consumer choice;

[12] Malmesbury has primary and secondary frontage definitions. The continuous pink line shows the primary fronage. The dotted pink line shows the wide area covered by the secondary frontage.

(C) no detrimental impact upon town centre investment; and (D) any Section 106 contributions to be agreed with local organisations.

4.131 Table 4.9 below provides a summary of the retail and service land use profile of Malmesbury town centre from the time of the previous Study (2012) and AY's updated version of Experian GOAD's most recent survey of the centre.

Table 4.9: land use profile of Malmesbury town centre, 2012-2020

	2012			2020		
	No.	%	UK Ave	No.	%	UK Ave
Convenience	6	7.6	8.5	7	8.6	10.1
Comparison	36	41.4	41.5	33	40.7	36.7
Service	28	31.2	35.2	30	37.0	39.0
Other	2	2.3	1.1	2	2.5	1.2
Vacant	15	17.2	13.6	9	11.1	13.0
Total	87	100	100	79	100	100

Source: Experian GOAD (2012) and AY (2020). Figures may not add due to rounding.

4.132 The data in Table 4.37 above indicates that there has been a drop in the number of retail/service uses in Malmesbury town centre over the past several years from 87 to 79. Over this period, there has been a small increase in the number of convenience goods retailers from 6 to 7 and the proportion of retailers has remained below the national average over this period. The household survey commissioned for this Study indicates that the town centre has a low share of first choice main food shopping trips with the small Co-op convenience store achieving a 4% market share. The Co-op has a 2% share of second choice main food trips, a 12% share of first choice top-up trips and 16% of second choice top-up food trips. Taking into account foodstores outside of the town centre, such as the Co-op on Gloucester Road and the Waitrose at Avon Mills, Malmesbury retains 40% of first choice main food trips, 31% of second choice main food trips, 76% of first choice top-up trips and 88% of second choice top-up trips.

4.133 The number of comparison goods retailers has fallen from 36 to 33 and despite this fall the proportion of comparison goods retailers in the centre is now above the national average. Retailers in the centre are mainly local independent traders. The small number of national multiple comparison goods are Clarks, Boots and WH Smith. The household survey evidence indicates the following (first choice) comparison goods market shares for Malmesbury town centre:

- Clothing and fashion goods – 8%
- Furniture / floorcovering / furnishings – 5%
- DIY – 13%
- Domestic appliances – 5%
- Small electrical goods – 1%
- Recreational goods – 19%
- Books / CDs / DVDs – 12%

- Health / beauty goods – 50%

4.134 A large part of Malmesbury is covered by a Conservation Area, including all of the town centre. Overall, the centre is very attractive with a mixture of building styles with properties which are clearly well maintained. The historic nature of the centre means that pavement areas are narrow in some places although it is nevertheless an attractive pedestrian environment.

4.135 With regards to accessibility, the main off-street car parks in and around the town centre are located on Station Road and Burnham Road. The Station Road car park has 145 spaces whilst Burnham Road has 17 spaces. There are also some on-street spaces along High Street. Bus stops in the town centre are located on High Street, St Dennis Lane and Cross Hayes Lane. These stops are visited by bus services which travel to and from Cirencester, Hullavington, Swindon, Yate, Royal Wootton Bassett, Chipping Sodbury and Tetbury.

4.136 In order to understand the occurrence of crime within Malmesbury town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

4.137 Overall, Malmesbury is considered to be a healthy town centre. Over the past several years vacancies in the centre have fallen which is an encouraging sign of the level of business demand for premises in the centre. Since the opening of the Waitrose store to the east of the town centre the number of convenience goods retailers does not appear to have been negatively affected and the trend in comparison goods retailers and service has generally followed the national average. With a strong local socio-economic profile and attractive town centre we can conclude that Malmesbury is a vital and viable town centre.

Market Lavington

4.138 Market Lavington lies in the central part of Wiltshire and is defined as a Local Service Centre. The village lies to the south of Melksham and to the east of Westbury. The development plan policies map defines a local service centre boundary along either side of High Street from its junction with White Street in the west to No.31 High Street in the east. The defined boundary also includes a small car parking area on Northbrook, Woodland Yard and Kings Court.

4.139 The land uses within the defined service centre boundary include a small number of retail/commercial uses including a Co-op foodstore, a Post Office, a pharmacy, a take-away, a public house, a hair salon. There is also a café on the western edge of the defined centre. Apart from these commercial uses, a large number of premises in the defined centre are residential properties which break up the commercial frontages.

4.140 The household survey commissioned for this Study provides limited information regarding the market share of retail facilities in Market Lavington. The survey indicates that the Co-op store has a 1.1% market of second choice main food trips in Zone 15, whilst it attracts 7% of first choice top-up trips and 14% of second choice second choice trips. In relation to comparison good shopping, Market Lavington does not achieve a particularly high market share across most categories, although the village centre does attract 7% of trips from Zone 15 residents for health and beauty goods.

4.141 In relation to the accessibility characteristics associated with this local centre, it has already been noted that there is a small off-street parking area. The main streets within the defined centre boundary, particularly along High Street are reasonably narrow although there is a limited amount of on-street parking on the northern side

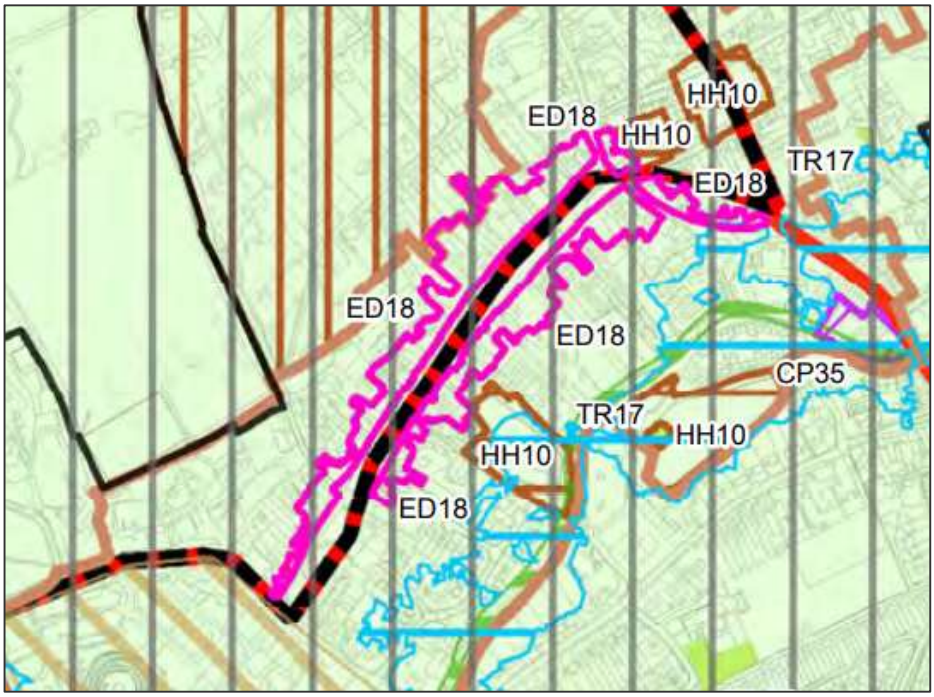
of the street. There are also some bus stops located in close proximity to the Co-op foodstore and these stops are visited by services which travel to Trowbridge and Devizes.

Marlborough

4.142 Marlborough lies in central Wiltshire and is situated around the River Kennet. The town lies 24 miles to the north of Salisbury and 10 miles to the south of Swindon. The development plan policies map shows that the town centre has just one designation which is a Prime Shopping Area which stretches along High Street from the junction with Bath Road / Pewsey Road in the south to New Road and The Parade in the north. The most distinctive feature of Marlborough town centre is the width of the High Street which includes on-street parking on both edges and also through the central area.

4.143 The prime shopping area in the town centre is shown in Figure 4.10 below[13].

Figure 4.10: extract from Wiltshire policies map for Marlborough town centre[14]



4.144 Table 4.10 below provides a summary of the retail/service land use data for Marlborough town centre between 2012 and 2020. The 2020 data has been collected by AY as an update to Experian GOAD's most recent survey in 2017. The 2012 data is provided by Experian GOAD.

13

[14] The prime shopping area boundary is represented by the continuous pink line in the figure above.

Table 4.10: land use profile of Marlborough town centre, 2012-2020

	2012			2020		
	No.	%	UK Ave	No.	%	UK Ave
Convenience	11	6.9	8.5	10	6.3	10.1
Comparison	86	53.8	41.5	83	51.9	36.7
Service	50	31.3	35.2	62	38.8	39.0
Other	1	0.6	1.1	1	0.6	1.2
Vacant	12	7.5	13.6	4	2.5	13.0
Total	160	100	100	160	100	100

Source: Experian GOAD and AY. Figures may not add due to rounding.

4.145 The above data indicates that there has been little change in the number of convenience goods retailers in Marlborough town centre between 2012 and 2020 with the proportion remaining below the national average. The difference between the proportion of convenience goods retailers in the centre and the national average has, however, grown with the difference now circa four percentage points rather than circa 1.6 in 2012.

4.146 The household survey data commissioned for this Study indicates that Marlborough attracts around 47% of all first choice main food shopping trips from residents of Zone 13 (the zone in which Marlborough lies) and also 21% of first choice main food trips from residents of Zone 14 (Pewsey). Marlborough attracts a similar amount of first choice top-up trips from Zone 13 residents but a much lower level of visitation from Zone 14 residents. The town centre Waitrose store attracts a 17% share of first choice main food trips from Zone 13 residents and 23% share of second choice main food trips.

4.147 The number of comparison goods stores in Marlborough town centre has seen a small decline over the past several years, from 86 in 2012 to 83 in 2020. However, the proportion of comparison goods retailers in the town centre (51.9%) remains well above the national average of 36.7% with this category occupying just over half of all surveyed units. Marlborough is reasonably unique amongst the small to medium-sized Wiltshire towns in that it has a very strong comparison goods retailer profile. National multiple comparison goods retailers include Boots, Monsoon, WH Smith, Dorothy Perkins, Clarks and Superdrug. Within the various comparison goods sectors Marlborough has an above average proportion of clothing and fashion retailers and also luxury/health/beauty retailers.

4.148 Within Zone 13 Marlborough has the following first choice market shares amongst the various comparison goods categories:

- Clothing/fashion – 21%
- Furniture/floorcoverings/home furnishings – 15%
- DIY goods – 14%
- Domestic appliances – 1%
- Small electrical goods – 0%
- Glassware/tableware/jewellery - 7%

- Books, CDs, DVDs – 34%
- Health and beauty goods – 64%
- Recreational goods – 23%
- Marlborough town centre also gains a reasonable share of comparison goods trips from residents of Zone 14.

4.149 The proportion of service retailers in the centre has risen in recent years (2012-2020) and is now close to the national average. There are a mixture of national multiple and local independent businesses, with the national multiples including Rick Stein, Costa, Café Nero, along with a number of the national high street banks. Within the various service sectors there is a below average proportion of food and beverage outlets and banks/building societies but a higher than average proportion of estate agents.

4.150 Marlborough has one of the most attractive and distinctive town centres in Wiltshire. It is covered entirely by a Conservation Area and a large majority of the buildings in the centre are nationally listed. Most buildings are either 2 or 3 stories and many have facades dating back to the 18th century. There is a high level of maintenance of most buildings along High Street and the pavement areas are wide enough to create a very attractive public realm which encourages easy and convenient pedestrian movement.

4.151 In relation to accessibility it has already been noted that High Street contains a large amount of on-street parking on either side of the street and also echelon parking down the central area[15]. In addition to this parking provision, off-street spaces can be found at:

- George Lane – 163 spaces
- Hilliers Yard – 165 spaces
- Hyde Lane – 65 spaces
- Kennet Place – 41 spaces
- Polly Gardens – 51 spaces

4.152 Bus stops in Marlborough town centre are located in the central and northern parts of High Street and are visited by services which travel to and from Tidworth, Ludgershall, Bedwyn, Salisbury, Pewsey, Aldbourne, Swindon and Hungerford.

4.153 In order to understand the occurrence of crime within Marlborough town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

4.154 Overall, Marlborough is considered to be a healthy town centre. It has a very low (and falling) vacancy rate which is a sign of the popularity of the town as retail and service destination and as a location where commercial businesses feel confident to trade. For a town of the size of Marlborough, its town centre has a significant amount of retail floorspace and a wide selection of retailers and service uses. In our view, the

[15] Maximum stay of 2 hours – 110 spaces in total

centre has a higher proportion and range of comparison goods than would be expected for a town of this size including a reasonably high number of comparison goods retailers.

Melksham

Structure

4.155 Melksham is a market town situated on the banks of Bristol Avon and is approximately 4.5 miles northeast of Trowbridge and 6 miles to the south of Chippenham. As per the 2011 census, the population of Melksham is 19,357, and as such the fifth largest settlement in the county. The town centre is relatively compact and easily accessible by a number of transports routes.

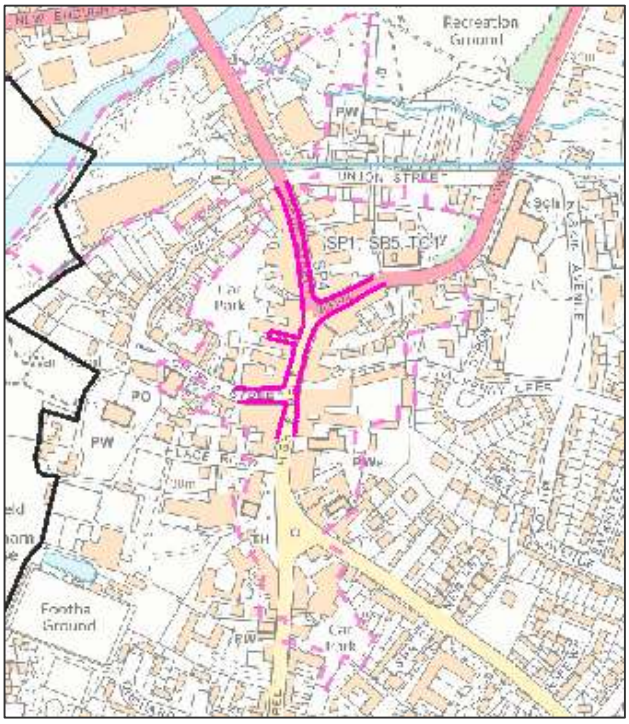
4.156 There are a number of Listed Buildings within Melksham, including Grade II* listed St Michael's Church and Grade II Listed 'The Grange' a former vicarage dating from the late 17th century.

4.157 The development plan policies map outlines the following relevant boundaries in relation to town centres:

- Primary Shopping Area: This is predominantly formed of Bank and High Street, stretching north to south, with the inclusion of parts of Lowbourne and Church St spreading off this route respectively.
- Commercial area: Stretching beyond the above boundary in every direction, the boundary is limited by the River Avon to the north-west and extends to King Street in the south.

4.158 These designations are shown in an extract from the development plan policies map in Figure 4.11 below.

Figure 4.11: extract from development plan policies map for Melksham town centre[16]



[16] The primary retail frontage boundary is represented by the continuous pink line whilst the wider commercial area boundary is shown as the dotted pink area

Diversity of Uses

4.159 Table 4.11 below outlines the retail and service land use profile of Melksham town centre at 2012 and 2020. The 2012 data is taken from Experian GOAD's survey of the centre from that year whilst the 2020 data is formed of a survey undertaken by AY which updates the most recent Experian GOAD survey of the centre in 2016.

Table 4.11: land use profile of Melksham, 2012-2020

	2012			2020		
	No.	**%**	**UK Ave**	**No.**	**%**	**UK Ave**
Convenience	11	8.5	8.5	11	8.7	10.1
Comparison	51	39.2	41.5	45	35.4	36.7
Service	51	39.2	35.2	56	44.1	39.0
Other	3	2.3	1.1	3	2.4	1.2
Vacant	14	10.8	13.6	12	9.4	13.0
Total	130	100	100	127	100	100

Source: Experian GOAD and Avison Young surveys

4.160 The data in table 4.17 above indicates that the number of convenience goods retailers in Melksham town centre has remained constant over the past several years. The proportion of units occupied by convenience goods retailers now stands at 8.7% which is below the national average of 10.1%.

4.161 In line with the national trend, there has been a reduction in the number/proportion of comparison goods retailers in the centre between 2012 and 2020. The proportion of comparison goods retailers have remained very slightly below the national average over this period and at the present time 35% of all surveyed units are occupied by comparison goods retailers.

4.162 Service uses have increased from 51 units in 2012 to 56 in 2020. The service sector is now the largest sector in Melksham town centre, occupying 44% of all surveyed units which is higher than the national average of 39%.

Vacancies

4.163 The town centre has a below average proportion of vacant units: 9.4% against a UK average of 13.0%. Vacant units appear to be clustered along Bank Street to the north of Melksham, particularly at the junction of Bank Street and Lowbourne.

Retailer Representation

4.164 The three largest convenience goods retailers in Melksham are Sainsburys, Iceland and Waitrose. The Sainsburys and Waitrose stores lie in the northern part of the town centre and have convenience goods sales areas of 1,890sq m and 900sq m respectively. Both stores sell a wide range of fresh, frozen and pre-packaged

convenience goods and are served by adjacent surface level car parks. The Iceland store lies on High Street / Avon Street and is also situated next to a large surface level car park. In relation to other convenience goods retailers in the town centre, the proportions of butchers and bakeries are above their respective national averages whist the proportion of newsagents and small convenience stores is below average.

4.165 Melksham town centre has a small number of national multiple comparison goods retailers including a Poundstretcher, Boots and Peacocks. As noted above, the proportion of comparison goods retailers in the town centre is very slightly below the national average although the proportion of clothing/fashion retailers in the centre is well below average. In contrast, the proportion of furniture/furnishings, books/stationery and health/beauty stores are well above their respective national averages.

4.166 Service uses in the centre are generally local independent traders although there is a Costa café and also a modest selection of national high street banks including HSBC, Natwest and Lloyds. Across all service categories, including food/beverage, financial services and estate agents, the proportion of businesses in the centre are above their respective national averages.

Customer Views and Behaviour

4.167 The survey of household shopping patterns commissioned for this Study provides the following market share information for Melksham town centre:

- Melksham lies in Zone 20 of the study area and all stores in the town retain 77% of first choice main food trips and 85% of second choice main food trips from residents of this zone. The town also attracts main food shopping trips from residents of Zone 21 (Corsham).
- The catchment of the town for top-up food shopping trips is more localised to Zone 20 with stores in the town attracting 87% of first choice trips and 77% of second choice trips.
- The Sainsburys store in the town centre has the largest share of first choice main food trips, at 31%. This store also attracts 22% of second choice main food trips, whilst the town centre Waitrose attracts 10% of second choice main food trips.
- In relation to comparison goods shopping, Melksham town centre attracts the following market share levels from residents of Zone 20:
    - Clothing/fashion – 6%
    - Furniture/floorcoverings/home furnishings – 15%
    - DIY – 9%
    - Domestic appliances – 6%
    - Small electrical products – 4%
    - Glassware/tableware/jewellery – 27%
    - Books, CDs, DVDs, - 13%
    - Health and beauty goods – 53%
    - Recreational goods – 19%

4.168 The household survey also provides the following information regarding leisure usage patterns associated with Melksham:

- For visits to health and facilities, the survey indicates that the most popular destinations are: Melksham Blue Pool (51%), the Christie Miller Sports Centre (8%) and the Springfield Leisure Centre in Corsham (13%). The main destinations for cultural trips for Zone 20 residents are: Bath city centre (38%), Bristol (35%), Swindon (4%), London (11%) and Trowbridge (5%).
- There is not a cinema in Melksham and therefore residents of Zone 20 travel to Trowbridge (Odeon, 67%), Chippenham (Reel Cinema, 16%) and Longwell Green (Vue, 7%).
- Food and beverage outlets in Melksham town centre are able to a large proportion of daytime trips to these uses from Zone 20 residents (56%). However, this strong catchment is a small one, as the town centre does not attract many daytime trips from residents of other zones in the study area. For daytime trips which leave Zone 20, these are associated with Devizes (8%), Bath (9%) and Trowbridge (6%). For evening trips, Melksham town centre has a slightly lower but still strong share of trips from Zone 20 residents, at 51%.

Environmental Quality

4.169 The general townscape of Melksham town centre benefits from a range of pre-war and post-way traditional building types, generally of between two and three. The majority of buildings are pre-war attractive terraced properties which have a good standard of maintenance/investment and make a positive contribution to the centre.

4.170 There are, however, modern buildings which have been inserted into the centre over the past decades. Some of the more modern buildings, such as a Sainsburys supermarket store in the northern part of the town centre, are functional and unremarkable although there are others which detract from the appearance of the centre. These include a number of buildings along High Street and the building which accommodates the Peacocks retail unit on Bank Street.

4.171 In line with many historic town centres in Wiltshire, the pedestrian areas throughout the town centre are adequate but not overly accommodating. This is, of course, a product of the historic urban form of the centre and does not cause excessive problems in terms of pedestrian movement.

Pedestrian Flows

4.172 During the course of preparing this Study observations were made regarding the levels of pedestrian flow across Melksham town centre. The highest levels of flow were observed to be along Bank Street and the northern part of High Street (close to the junction with Lowbourne). It was also encouraging to note that a reasonable level of pedestrian linkages between the two supermarkets in the northern part of the town centre and the remainder of the centre were also observed.

Occurrence of Crime

4.173 In order to understand the occurrence of crime within Melksham town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

Accessibility

4.174 In relation to accessibility via private car, Melksham town centre has the following available car parks:

- Bath Road – 68 spaces
- Church Street – 131 spaces
- King Street – 84 spaces
- Lowbourne – 66 spaces
- King Street – 25 spaces
- Sainsburys – circa 250 spaces

4.175 Melksham railway station is located to the north of the town centre, on the northern side of the River Avon. The station is visited by train services which travel to Chippenham, Westbury and Swindon.

4.176 Bus stops are located throughout the town centre, at Bank Street, High Street, Lowbourne and Market Place. Services which visit these locations travel to Frome, Box, Trowbridge, Bath and also a circular town-wide service.

Conclusions

4.177 Melksham has a limited shopping catchment due to its location close to Chippenham and Trowbridge, particularly in relation to comparison goods shopping. The town is, however, able to retain a large majority of main and top-up food shopping trips with the town centre Sainsburys supermarket achieving the largest market share of main food shopping trips. Between 2012 and 2020 the town centre has followed the national trend in terms of falling comparison goods retailers and an increasing amount of service uses. Vacancies have fallen slightly since the 2012 Study and remain below the national average.

Mere

4.178 Mere lies in the south-western part of Wiltshire close to the border with South Somerset, Cranborne Chase and West Wilshire Downs Area of Outstanding Natural Beauty. The village lies approximately 23 miles west of Salisbury and 20 miles south of Trowbridge. It is situated on the A303. Shops and services in the town are clustered around the Square and Clock Tower around Salisbury Street, Church Street and Castle Street. However, there is not any defined 'town centre' and/or primary shopping area boundary definitions in the development plan policies map.

4.179 AY has undertaken a survey of retail and service uses in Mere based upon the Experian GOAD definition of land uses. The survey recorded a total of 23 units in the village, including two convenience goods retailers, nine comparison goods retailers, ten service uses, one miscellaneous use and one vacant unit. Mere lies in Zone 6 in the study area and the household survey commissioned for this Study indicates that the Co-op convenience goods store concentrates upon attracting top-up food shopping trips from Zone 6 with a 1% market share. In relation to comparison goods shopping, Mere has a 10% share of second choice furniture/floorcovering/home furnishing trips from Zone 6 residents along with 6% for domestic appliances, plus 2% for health and beauty goods.

4.180 Off-street car parks can be found on Castle Street (35 spaces) and Salisbury Street (67 spaces), whilst there is also some on-street parking areas along these roads. The three main bus stops in the central part of Mere are located at The Square and the western end of Salisbury Street. These stops are visited by services which travel to and from Wilton, Warminster, Salisbury, Frome and Gillingham.

4.181 The whole of the central area of Mere is covered by a Conservation Area and many of the buildings in this area are nationally or locally listed. Most buildings across the central area are either two or three storeys in height and many are terraced. Due to the historic nature of the central area, the pavement areas can be narrow in places which can sometimes hamper the ease of pedestrian movement. The Square / clock tower area is the most memorable part of the centre, providing an attractive focal point including some seating areas and attractive trees.

Pewsey

4.182 Pewsey lies in central Wiltshire on the northern edge of Salisbury Plain. It is one of the largest villages in Wiltshire and lies on the railway line linking London with the West Country. The development plan policies map defines a 'new development in service centres' boundary which includes Market Place and High Street. The central area of Pewsey has a variety of building styles including some thatched properties on the western side of Market Place alongside the more modern fire station and Parish Council post-war buildings on the opposite side of Market Place plus a small amount of post-war buildings on River Street. The Pewsey Neighbourhood Plan was 'made' in June 2015 and covers a range of topics including the economy, the natural environment, housing, transport, heritage and developer contributions. In relation to the economy, one of the Plan's policies (including Policy 3) is to retain and enhance retail and office space in the village centre and prevent development that would reduce this.

4.183 Experian GOAD do not undertake surveys of Pewsey so AY have conducted their own survey of retail and service uses in the centre in early 2020. The survey found that there were 59 units, including 5 convenience goods retailers, 21 comparison goods retailers, 29 service uses and two vacant units.

4.184 Pewsey lies in Zone 14 of the study area created to inform the household survey and quantitative need assessment for this Study. The results of the household survey indicate that the Co-op on High Street attracts 17% of first choice main food shopping trips from residents of Zone 14, along with 12% of second choice main food trips, 66% of first choice top-up food shopping trips and 28% of second choice top-up trips. The Co-op store is located off High Street and has a reasonable sized net sales area of circa 900sq m. The store is served by a time-limited parking area for around 170 cars. The Spar store on North Street in Pewsey, due to its size, concentrates upon top-up food shopping trips with a 1% share of first choice top-up trips from Zone 14 residents and a 10% share of second choice top-up trips. Pewsey does not attract any main or top-up food shopping trips from any other zones in the study area.

4.185 In relation to its accessibility characteristics, bus stops in the central part of Pewsey are located on either side of North Street, adjacent to the Methodist Church and Fire Station. These stops are visited by hourly services which travel to and from Salisbury, Amesbury, Larkhill and Marlborough. Due to the historic narrow nature of many streets in the central area of Pewsey there is limited opportunity for on-street parking. Off-street facilities are located at North Street (83 free spaces) and Hallgate House (21 free spaces).

4.186 The household survey results indicate that non-food shopping, Pewsey achieves the following market shares amongst Zone 14 residents:

- Clothing/fashion – 3% of first choice trips and 2% of second choice trips
- Furniture/floorcoverings/home furnishings – 12% of first choice trips
- DIY – 2% of first choice trips and 12% of second choice trips
- Domestic appliances – 43% of first choice trips and 3% of second choice trips
- Small electrical appliances – 31% of first choice trips and 29% of second choice trips
- Glassware/tableware/jewellery/watches – 2% of first choice trips
- Books, CDs and DVDs – 8% of first choice trips and 14% of second choice trips
- Health and beauty goods – 43% of first choice trips and 15% of second choice trips
- DIY goods – 5% of first and second choice trips
- Gardening goods – 8% of first choice trips and 13% of second choice trips

4.187 Overall, whilst Pewsey occupies the third tier of the settlement hierarchy in Wiltshire, it is considered to perform an important shopping and service role. It has a large retail and service offer for a local service centre and is able to retain both main and top-up food shopping trips from the local area along with a reasonable amount of comparison goods trips. There are also very few vacancies in the centre indicating that demand for commercial property remains good and leads to the overall conclusion that Pewsey is a healthy centre.

Royal Wootton Bassett

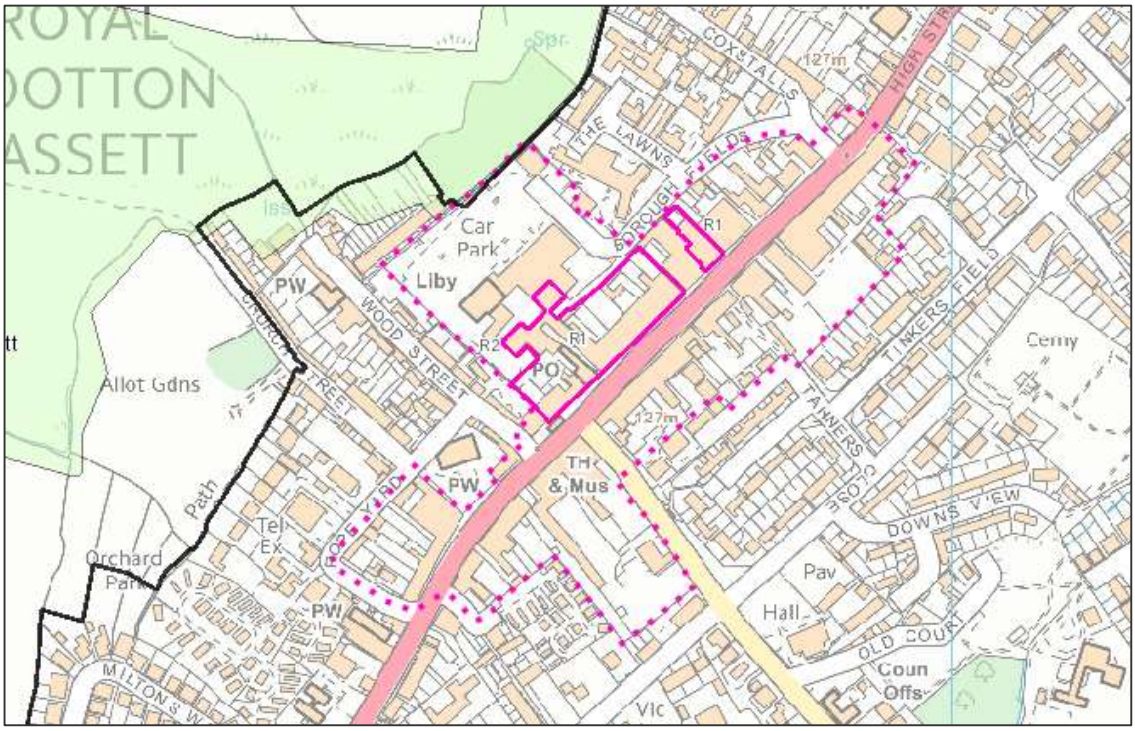
4.188 Royal Wootton Bassett lies in the north-eastern part of Wiltshire, to the north-east of Chippenham and close to administrative boundary with Swindon. The development plan policies map provides two separate boundaries in the town centre: a primary frontage and a secondary frontage. The primary frontage extends along the northern side of High Street between its junction with Wood Street and the Iceland store. It also includes the Borough Fields Shopping Centre. The defined secondary frontage encompasses a wider area including the surface level car park adjacent to the Borough Fields Shopping Centre and a wider extent of High Street from the junction with Rope Yard in the south and up to the junction with Borough Fields in the north.

4.189 Section 3 of the made Royal Wootton Bassett Neighbourhood Plan includes the strategy for the town centre. Policy 1 indicates the Plan's support for new or improved community facilities to meet the needs of existing and future residents, whilst Policy 2 offers its support for new and retained shops in the centre.

4.190 An extract from the development plan policies map showing these designations is contained in Figure 4.12 below.

Figure 4.12: extract from development plan policies map for Royal Wootton Bassett[17]

[17] The defined primary frontage area on the northern side of High Street is shown by the continuous pink line whilst the wider secondary frontage boundary is shown by the dotted pink line.



4.191 Table 4.12 outlines the retail and service land use profile of Royal Wootton Bassett town centre between 2012 and AY's updated land use survey in early 2020. The data is based upon the Experian GOAD survey of the centre and updated in 2020 by 2020 using the same method of classifying retail and service uses.

Table 4.12: land use profile of Royal Wootton Bassett town centre, 2012-2020

	2012			2020		
	No.	**%**	**UK Ave**	**No.**	**%**	**UK Ave**
Convenience	7	6.5	8.5	11	10.1	10.1
Comparison	45	41.7	41.5	43	39.4	36.7
Service	41	38.0	35.2	47	43.1	39.0
Other	2	1.9	1.1	2	1.8	1.2
Vacant	13	12.0	13.6	7	6.4	13.0
Total	108	100	100	109	100	100

Source: Experian GOAD and Avison Young. Figures may not add due to rounding.

4.192 The above data indicates that there has been an increase in the proportion of convenience goods retailers in the town centre over the past eight years, from 7 to 11. The proportion of convenience goods retailers has now risen from below the national average in 2012 to become commensurate with the average this year.

4.193 The trend for comparison goods retailers and service uses has followed the national trend over the past several years with the former declining and the latter increasing. Both are now above their respective national averages.

4.194 Vacancies have decreased over the past several years, from 13 in 2012 to 7 in 2020. In 2012 the proportion of vacant retail units in the town centre was close to, but slightly below, the national average but the fall between 2012 and 2020 has meant that the proportion of vacant units in the town centre is now around six and a half percentage points below the national average.

4.195 Up until recent times the main large foodstore in Royal Wootton Bassett was the Sainsburys in the Borough Fields Shopping Centre. Several years ago a proposal for a large Tesco supermarket on the western edge of the town was refused permission although the Council has now granted permission for a new ALDI foodstore to convert the former Grange Land Rover garage/showroom. This store is now trading and the household survey results indicate the following:

- Royal Wootton Bassett lies in Zone 23B of the study area which is a new smaller zone created for this Study in order to accurately estimate shopping patterns in and around the town. Overall, the town retains one fifth of first choice main food trips from Zone 23B residents along with 27% of second choice main food trips. The Sainsburys store in the town centre attracts a 15% share of first choice main food trips and 11% of second choice main food trips. The opening of the new ALDI store took place relatively recently and therefore may not have yet reached a settled trading pattern but the survey results indicate a 4% share of first choice main food trips and an 11% share of second choice main food trips. In relation to the levels of main food expenditure 'leaking' outside of Zone 23B it remains the case that a number of stores in Swindon and Chippenham continue to trips from residents of the Royal Bassett area.
- In relation to top-up food shopping, the town attracts 30% of first choice trips and 17% of second choice trips. The town centre Sainsburys is the most popular first choice destination with an 18% share of trips from Zone 23B residents.

4.196 The household survey results also provide information regarding the usage of Royal Wootton Bassett town centre in relation to comparison goods shopping. The survey results indicate that the town centre draws the large majority of its trade from residents of Zone 23B along with very small amounts of trade from Zones 24 (Swindon), 25 (Cricklade) and 28 (Cirencester). In relation to Zone 23B the survey results indicate that the town centre achieves the following market shares:

- Clothing/fashion – 2% share of first choice trips and a 4% share of second choice trips
- A 1% share of first choice trips in relation to furniture, floorcoverings and home furnishings and a 4% share of second choice trips
- DIY goods trips - 4% share of first choice trips and a 14% share of second choice trips
- Domestic appliances – 4% market share
- Smaller electrical goods – 1% of first choice trips
- Glassware/tableware/jewellery/watches – 9% of first choice trips and 13% of second choice trips
- Books, CDs, DVDs – 10% of first choice trips and 13% of second choice trips
- Health and beauty goods – a 34% share of first choice trips and a 10% share of second choice trips
- Recreational goods – a 8% share of first choice trips and a 11% share of second choice trips

4.197 In relation to leisure uses in Royal Wootton Bassett, the main health and fitness facility is the Lime Kiln leisure centre which is a partnership between Wiltshire Council and the private sector. There is also a 24 hour gym at Bowman Court which opened in later 2019. The household survey results indicate that of the residents of Zone

23B who visit health and fitness facilities 17% visit the Lime Kiln leisure centre on a regular basis. The majority of people who also regularly visit health and fitness facilities travel to Swindon.

4.198 In relation to other leisure activities, Royal Wootton Bassett does not have a cinema and the survey results indicate that 77% of those residents in Zone 23B who visit the cinema travel to Swindon, primarily the Cineworld and Empire facilities. The survey also indicates that of those people surveyed in Zone 23B who visit food and beverage (F&B) outlets in the evening 21% visit Royal Wootton Bassett town centre most often, with 27% travelling to Swindon town centre. Royal Wootton Bassett town centre also attracts 3% of evening F&B trips from residents of zones 24 and 26 apiece. In relation to daytime F&B trips, market shares amongst Zone 23B residents are as follows: Bath (5%), Chippenham (10%), Marlborough (4%), Swindon (20%), RWB (31%). In relation to cultural trips, 45% of Zone 23B residents visit the Wyvern Theatre in Swindon.

4.199 In relation to accessibility characteristics, the main off-street parking areas in and around the town centre can be found at: Borough Fields (255 spaces) and Wood Street (30 spaces). In addition, there is a plentiful amount of on-street parking provision along some parts of High Street, along with a small parking area to the rear of the Iceland store. The main bus stops in the town centre can be found in the central part of High Street, close to the Iceland store. These stops are visited by services which travel to and from Swindon, Chippenham, Calne, Sutton Benger, Lyneham and Malmesbury.

4.200 All of the defined town centre area is covered by a Conservation Area, extending along High Street from Lime Kiln Road and Whitehill Lane. High Street is a reasonably wide and attractive street which is lined by many attractive two and three storey properties along its entire length. Many of these properties are pre-war and a reasonable proportion of these are nationally listed. One of the most iconic buildings in the town centre is the Town Hall Museum which is located in the southern part of High Street in the central part of the highway. Royal Wootton Bassett Town Council also run a weekly street market on High Street every Wednesday.

4.201 In order to understand the occurrence of crime within Royal Wootton Bassett town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

4.202 Overall, Royal Wootton Bassett is considered to be reasonably healthy town centre with vacancies falling and the trend in the proportion of different types of retail and service uses following the national average. Shopping patterns associated with the town will always be influenced by larger retail destinations such as Swindon and, to a lesser extent, Chippenham. The 2020 household survey results reveal a much lower market share for the Sainsburys store in the town centre, leading to a materially lower turnover for this store. The difference will of course be explained, in part, by trade diversion to the new ALDI store although it may be necessary to gather further evidence base information to assist in the determination of future retail development proposals. The new household survey also shows a continued large level of leakage primarily to Swindon which is inevitable given the amount of retail floorspace in that settlement which will continue to constrain the amount of retail floorspace which can be provided and sustained in Royal Wootton Bassett.

Salisbury

Structure

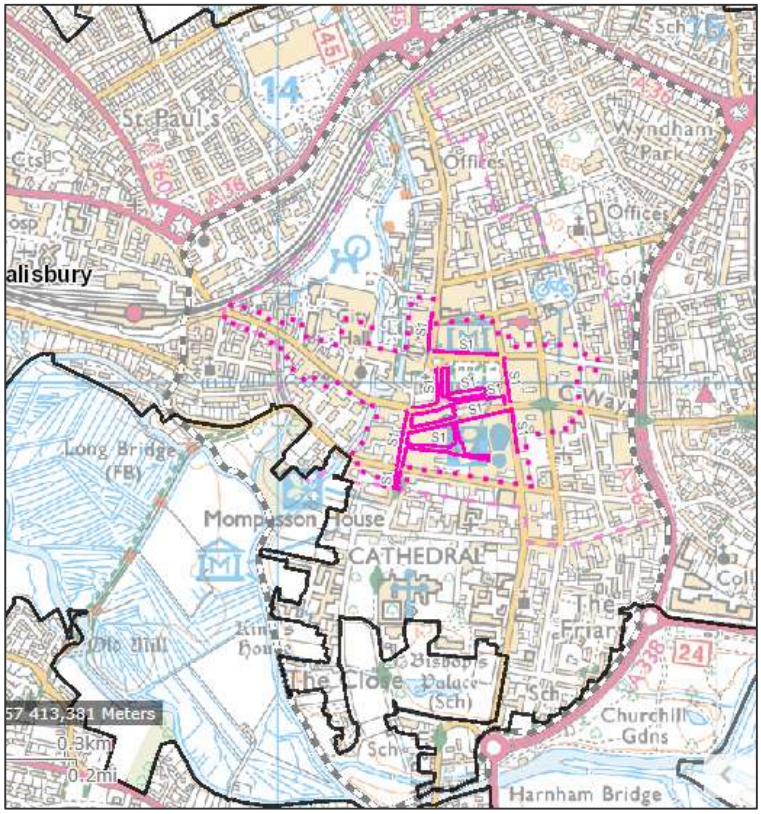
4.203 Salisbury city centre is the largest 'town centre' in Wiltshire. It is a cathedral city with a population of around 40,000 people with the historic street pattern based upon the medieval city. The current development plan policies map provides four separate boundary / frontage definitions, including:

- Prime shopping frontages[18] along Blue Boar Row, Market Place, Butcher Row, Ox Row, High Street, Minster Street, New Canal, Silver Street, Fish Row and Old George Mall.
- Secondary shopping area[19] which includes Fisherton Street, Bridge Street, the western end of Winchester Street, the southern end of Castle Street and the western end of Milford Street.
- A city centre boundary[20] which includes all of the above plus the Maltings, central car park, land to the south of Bridge Street and New Street, Trinity Street, St Ann Street and Gigant Street.
- A wider 'central area' definition[21] which extends from the Rivers Nadder and Avon in the south and is bordered to the north, west and east by the city's inner ring road.

4.204 These boundaries are shown in an extract from the development plan policies map in Figure 4.13 below.

[18] Shown as a continuous pink line on the plan
[19] Shown as the dotted pink line on the plan
[20] Shown as the dashed pink line on the plan
[21] Shown as the dotted black and white line in Figure 4.13

Figure 4.13: extract from development plan policies map for Salisbury city centre



4.205 At the start of 2020, the Council adopted the Salisbury Central Area Framework ('CAF'). The CAF provides a detailed and wide-ranging analysis of the city centre and highlights the following opportunity areas:

- Chequers – identified for residential, art, culture, retail, hotel and food/beverage uses. This area includes the Salt Lane and Brown Street car parks.
- Fisherton Street – upgrading of the public realm.
- The Centre – concentrating upon opportunities for new retail provision
- The Maltings and cultural quarter – opportunities to improve the city centre's cultural offer and the evening food and drink economy.
- The Meadows – improvements to the city centre's connectivity.
- Churchfields – enhanced employment opportunities.
- The Station area – new built commercial and hotel uses.
- Cathedral Close – improved connections with the rest of the city centre.
- Castle Street North – new residential accommodation.

Diversity of Uses

4.206 Table 4.13 below provides a summary of the retail land uses in Salisbury city centre between 2009 (taken from the 2011 Study), 2019 (Experian's most recent survey) and AY's updated survey in 2020.

Table 4.13: land use profile of Salisbury city centre, 2012-2020

	2012			2019			2020		
	No.	**%**	**UK Ave**	**No.**	**%**	**UK Ave**	**No.**	**%**	**UK Ave**
Convenience	28	6.2%	8.5%	30	6.6%	10.0%	30	6.6%	10.1%
Comparison	233	51.5%	41.5%	193	42.6%	37.4%	194	42.9%	36.7%
Service	151	33.4%	35.2%	169	37.3%	38.8%	173	38.3%	39.0%
Other	2	0.4%	1.1%	5	1.1%	1.2%	8	1.8%	1.2%
Vacant	38	8.4%	13.6%	56	12.6%	12.5%	47	10.4%	13.0%
Total	452	100%	100%	453	100%	100%	452	100%	100%

Notes: Experian GOAD and Avison Young 2020 survey

4.207 As the above data shows, there has been a small rise between 2012 and 2020 in relation to the number of convenience goods retailers in the city centre, from 28 to 30, although the proportion has remained consistently below the national average. There has been a noticeable drop in the number of comparison goods retailers, from 233 to 194, although the proportion remains above the national average indicating the continued strength of Salisbury as an important and popular non-food shopping destination. In line with the national trend, the proportion of service uses in the city centre has increased over the past eight years and is now very close to the national average.

4.208 In relation to leisure uses in and around the city centre:

- The two main cinemas in Salisbury are the Odeon on New Canal and Salisbury Arts Centre. The Odeon attracts 77% of cinema-going trips from residents of Zone 4 plus a reasonable market share from zone 1 (8%), zone 3 (13%), zone 5 (41%) and zone 6 (5%). The Arts Centre attracts 1% of trips from Zone 3.
- In relation to trips out for eating and/or drinking, the survey results indicate that Salisbury city centre attracts 84% of trips out in the evening by Zone 4 residents. Evening trips are also attracted from the following zones: zone 1 (3%), Zone 3 (20%), zone 5 (20%) and zone 6 (10%).
- In relation to daytime trips to food and beverage outlets, the household survey indicates that the city centre attracts a 88% share of trips from residents of Zone 4, along with a 19% share of trips from Zone 3, 21% from Zone 5 and 10% from Zone 6.
- The survey reveals the following market shares for trips to health and fitness facilities in Salisbury from Zone 4 residents: Sports Direct Fitness (11%), PureGym (16%), Downtown Leisure Centre (5%), Five Rivers leisure centre (28%).

Vacancies

4.209 Between 2012 and 2020 the number of vacant retail units in Salisbury city centre has fluctuated. Vacancies rose from 38 to 56 between 2012 and 2019, bringing them in to line with the national average. However, there was a reduction, from 56 to 47, between 2019 and 2020, meaning that the proportion of vacancies in the city centre is now three percentage points below the national average. There are no particular concentrations

of vacancies across the centre although there is a higher prevalence in the secondary shopping areas around Catherine Street and Milford Street. With regards to the changes in vacancy levels over the past several years, one potential influencing factor could have been the Salisbury Novichock poisonings which may have been an influencing factor behind the noticeable rise in vacancies between 2012 and 2019. However, vacancies have now fallen in recent times suggesting that there does not appear to have been a longer-lasting impact, whilst the changes in the other retail and service sectors in the city centre follow the national trend and which are also being experienced in some other Wiltshire town centres.

Retailer Representation

4.210 Salisbury city centre has one of the best range of retail and services in Wiltshire. The comparison goods sector includes a strong range of both national multiple and local independent traders, with national multiples including Boots, TK Maxx, Marks and Spencer, New Look, Waterstones, Superdrug, Jigsaw and H&M. Fisherton Street and Winchester Street are important and vibrant locations for independent retailers. In relation to individual categories of comparison goods retailer, Salisbury city centre has a higher proportion of clothing, footwear and fashion retailers than the national average, which is also true for sports/recreational goods and personal/luxury items such as jewellery.

4.211 The largest convenience goods retailers in the city centre are a Sainsburys supermarket located at The Maltings. The convenience goods sales area of the store extends to 1,800sq m net and offers a wide range of fresh, refrigerated, frozen and pre-packaged food goods. The other large convenience goods store is a Tesco Metro at circa 2,000sq m net. Other stores include Iceland, although there are below (national) average proportions of butchers, newsagents, greengrocers and bakers.

4.212 Within the service sector there are a good range of national high street banks and building societies, along with a number of national multiple food and beverage establishments. In total there are 63 food and beverage establishments (including cafes, restaurants and take-aways) although these, as a proportion of all surveyed units, is below the respective national average. The proportions of health and beauty business and estate/property estates are, however, above their respective national averages.

Customer Views and Behaviour

4.213 The survey of household shopping patterns commissioned for this Study has been able to provide detailed information on shopping patterns associated with Salisbury city centre. This information is contained in Tables 4, 5a, 6 and 7a at Appendix II and can be summarised as follows:

- In relation to first choice main food shopping destinations, Salisbury city centre attracts around one fifth of all trips from Zone 4 residents (the zone in which Salisbury lies). The Tesco Metro store has a 9.8% market share, whilst the Sainsburys store attracts 8.1% of first choice trips from Zone 4. The Sainsburys store is a more popular second choice food shopping destination with a 15% share of such trips from Zone 4 residents.
- In relation to top-up food shopping, the Sainsburys and Tesco Metro stores attract 7% and 5% of first choice trips respectively of Zone 4 residents. In relation to other top-up food shopping trips, the Sainsburys and Tesco Metro stores attract just over one third of all trips from Zone 4 residents. Unlike some of the larger

supermarkets and foodstores outside of the city centre, city centre foodstores do not generally attract main and top-up food shopping trips from outside of Zone 4.

- In relation to non-food shopping trips, Salisbury has a wide catchment with non-bulky stores in the city centre being able to draw trade from Zones 1, 3, 4, 5, 6, 8, 9, 11, 14 and 15. There is a lower level of market penetration for bulky comparison goods stores, which is due to the influence of larger out of centre retail warehouse stores. In relation to the specific market shares for comparison goods trips from local (Zone 4) residents, Table 6a at Appendix II indicates the following:
  - Half of all first choice clothing/footwear trips and 20% of second choice trips
  - 21% of first choice furniture/floorcoverings/household textiles trips and 17% of second choice trips
  - 17% of first choice trips for DIY goods
  - A market share of 11% for first and second choice trips for domestic appliances
  - Attracting 18% of first choice trips from Zone 4 residents for small electrical appliances and 7% of second choice trips
  - One third of all trips associated with glassware and tableware goods, along with jewellery and watches
  - Around one third of all first choice trips associated with books, CDs and DVDs
  - Attracting around two thirds of shopping trips associated with health and beauty products and one third of second choice trips
  - One third of trips associated with recreational goods (including sports goods and toys)
  - In relation to the balance between city centre and out of centre stores across Salisbury, the city centre generally has a higher market share amongst non-bulky comparison goods shopping trips.

4.214 The household survey has also obtained data regarding the usage of Salisbury city centre from the local population and provides the following information:

- 75% of local residents visit the city centre at least once a week, with a further 8% visiting once a fortnight.
- The main reasons for visiting the city centre are: non-food shopping (33%), main-food shopping (29%), small scale top-up food shopping (14%), eating at cafes, restaurants and public houses (32%), visiting financial services (16%) and entertainment (i.e. cinema, bingo etc) (10%)

Environmental Quality

4.215 The historic core of the conservation area consists of two principal areas each with a distinct character; the quiet formality of The Close, and the busy commercial and residential area set within the medieval grid of streets. Both of these areas are significant for their quality and the special interest of the built environment.

4.216 The Close has at its heart the cathedral, surrounded by a series of grand houses ranging in date from the thirteenth to the eighteenth century. These are bounded by the medieval precinct wall to the east, south and

north and entered via one of three medieval gates. The spire of the cathedral serves as a focal point for many views within the city and for miles around.

4.217 Within the slightly skewed grid of streets, laid out at the time of the foundation of the city in the early thirteenth century and largely dictated by the inclusion of watercourses fed by the river, there is a wealth of architectural styles and materials. Many medieval timber framed houses, shops and inns have been re-fronted in the Georgian period but their scale and idiosyncrasies (irregular fenestration, jetties, parapet eaves lines with steep tile roofs behind), all make a valuable contribution to the character and appearance of the conservation area, providing numerous examples of outstanding townscape quality which are characteristic of the city.

4.218 It should be noted that the ring road (Churchill Way) is an uncompromisingly modern barrier forming part of the eastern edge of the conservation area and severing some historic areas from each other (for example St Martins Church environs and St Ann Street). This has fundamentally changed the way the city is perceived and experienced by visitors.

Pedestrian Flows

4.219 Salisbury is the only 'town centre' in Wiltshire to regularly collect data on pedestrian footfall. The available data on the Salisbury BID web-site covers the period between January 2018 and August 2020. The available data provides the following information which is salient to the health of the city centre:

- Data is collected at three locations in the city centre. The busiest location is High Street, followed by Queen Street and then Fisherton Street.
- The weekly averages across all three count points show that there has been a drop in footfall of around 30% between August 2020 and August 2019. This has clearly been caused by the impact of the COVID-19 pandemic, which is emphasised by the available data for April 2020 and May 2020. The difference between average footfall over the period April 2020 and April 2019 was -81% and the drop between May 2020 and May 2019 was -77%.
- It is also useful to examine the data for 2018 as this may provide an indication of the usage of the city centre in response to the Novichock attack in March 2018. The published data for April 2018 indicates that footfall during April 2018 was 15% lower than the previous year, with a similar drop observed for May.

Occurrence of Crime

4.220 In order to understand the occurrence of crime within Salisbury city centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

Accessibility

4.221 Given the size and role of the city, Salisbury is served by a wide range of bus services. The main locations for bus stops in the city centre are along Blue Boar Row, New Canal, Castle Street and Endless Street. Buses visiting these stops travel to Amesbury, Tidworth, Southampton, Bournemouth, Andover, Trowbridge and Laverstock, along with a circular 'town' service. There are also park and ride sites which allow visitors to Salisbury by private car to travel to the city centre by bus.

4.222 On the eastern side of the city centre is Salisbury's railway station which is a short 10 minute walk from the core shopping area. Train services visiting the station include the South Western Railway service to London Waterloo, Axminster, Andover, Southampton, Honiton and Exeter and GWR services to Portsmouth, Bath, Bristol and Cardiff.

4.223 In relation to accessibility via private car, there are the following car parks in and around the city centre:

- Brown Street East – 29 spaces – maximum stay 3 hours
- Brown Street West – 113 spaces – maximum stay 3 hours
- Central car park – 887 long stay spaces and 219 short stay spaces
- College Street – 39 spaces – long stay
- Culver Street – 500 spaces – long stay
- Five Rivers Leisure Centre – 200 spaces – maximum stay 3 hours
- Lush House – 77 spaces – maximum stay 3 hours
- The Maltings – 586 spaces – maximum stay 3 hours
- Millstream – 39 spaces – long stay
- Salt Lane – 157 spaces – maximum stay 3 hours
- Southampton Road – 97 spaces – long stay

Conclusions

4.224 Overall, Salisbury city centre is considered to be a healthy and attractive centre. It is a popular centre for both non-food and food shopping, particularly the former, with a wide catchment area across southern Wiltshire. In line with most market towns, the past several years have seen a shift between comparison goods and service uses, with the former falling and service uses increasing. However, the strength and attractiveness of the city centre means that the proportion of comparison goods retailers remains above its respective national average. The performance of the city centre is also, no doubt, helped by the presence of the cathedral and the general attractiveness of the built environment.

Tidworth

4.225 Tidworth is located in the southern part of Wiltshire, on the eastern edge of Salisbury Plain. The town is located approximately 15 miles to the north of Salisbury, 10 miles west of Andover, 24 miles south from Swindon and 26 miles west of Warminster. The town has a large military presence and the army is the largest local employer in the town. Retail and service units cater to the needs of both the military and civilians and units are dispersed throughout the town including the primary shopping area of Station Road, and secondary shopping areas of Pennings Road and Zouch Market.

4.226 Experian GOAD do not undertake surveys of Tidworth town centre and therefore AY has undertaken its own survey of the centre in centre. Retail and service uses in the centre have been classified using Experian's 'centre' report categorisation and are summarised in Table 4.14 below.

Table 4.14: land use profile of Tidworth town centre, 2020

	2020		
	No.	%	UK Ave
Convenience	4	13.8	10.1
Comparison	11	37.9	36.7
Service	13	44.8	39.0
Other	1	3.4	1.2
Vacant	0	0.0	13.0
Total	29	100	100

Source: Avison Young survey, 2020

4.227 The lack of vacancies in the defined town centre boundary in Tidworth is a sign of the good health of the centre and a good level of demand from retail businesses. The main convenience goods retail in the centre which dominates the centre is a large Tesco supermarket. The store sells a wide range of fresh, frozen and pre-packaged convenience goods alongside a reasonably large comparison goods area. The household survey commissioned for this Study indicates that the Tesco store attracts one third of all first choice main food shopping trips from residents of Zone 11 and 23% of second choice trips main food trips. Overall, Tidworth attracts circa 42% of first choice main food trips from residents of Zone 11.

4.228 The other large foodstore in the centre is Lidl, located close to the junction of Pennings Road and Station Road. The store attracts 5% of first choice main food shopping trips and 12% of second choice trips. In relation to top-up food shopping, Tidworth attracts 47% of first shopping trips and 27% of second choice trips. The Tesco store attracts 34% of first choice trips from Zone 11 residents and 9% of second choice trips. The Lidl store attracts 9% of top-up food shopping trips. Stores in Tidworth also attract a small amount of food shopping trips from residents of Zones 9 and 10.

4.229 In relation to comparison goods shopping, the household survey indicates that Tidworth attracts the following share of first choice shopping trips from residents of Zone 11 of the study area:

- Clothing/fashion goods – 8% (solely associated with the Tesco store)
- Domestic appliances – 1% (Tesco)
- Glassware/tableware – 18% (Tesco)
- Books, CDs, DVDs – 9%
- Health and beauty goods – 28%
- Recreational goods – 7%
- Gardening products – 4%

4.230 In relation to its accessibility characteristics, the main two off-street car parks in Tidworth are associated with the two large foodstores (Tesco and Lidl). The Tesco store accommodates around 400 parking spaces and the Lidl has circa 100 spaces. There is also a limited amount of on-street parking spaces on Station Road. Bus stops in and around the defined centre can be found on Station Road, Park Road and Lahore Road. Bus services which visit these stops travel to and from Andover, Amesbury, Salisbury, Ludgershall and Porton.

4.231 Tidworth provides a small centre with a localised function for the small shops and services along Station Road. The catchment of the centre is, however, significantly expanded by the role of the Tesco and Lidl foodstores which attract main and top-up food shopping trips from beyond Tidworth. These stores are likely to benefit the remainder of the centre via linked trips. As noted elsewhere in this chapter, Tidworth has a strong relationship with nearby Ludgershall with Tidworth attracting many main and top-up food shopping trips from the wider area and influencing Ludgershall to rely on top-up food shopping trips. The scale of food shopping provision in Tidworth is such that it provides sufficient capacity for Tidworth and Ludgershall combined.

Tisbury

4.232 Tisbury lies on the south-western edge of Wiltshire to the west of Salisbury and close to the border with Dorset. The development plan policies map does not define a 'centre' boundary for Tisbury although most of the retail and service outlets are located along High Street which rises from south to the north and has generally narrow pavements on either side of the street. High Street has a mixture of pre and post war properties and accommodates some on-street parking provision on its western side. These parking areas can make the highway very narrow in places making it difficult for two-way traffic to pass.

4.233 Experian GOAD do not undertake regular surveys of retail and service uses in Tisbury and therefore AY has undertaken its own survey of uses in the High Street area in early 2020. The survey recorded a total of 26 retail and service units in the High Street area, including: four convenience goods retailers, 12 comparison goods retailers, seven survey uses, a post office and two vacancies.

4.234 Tisbury lies in Zone 5 of the study area used for the household survey. This is a reasonably large zone containing a number of other small village and hamlets and also stretching close to Wilton, Mere, Salisbury, Shaftesbury and Gillingham. The small Co-op store on High Street has a 2% share of main food trips from Zone 5 residents and attracts 19% first choice top-up food shopping trips from Zone 5. The survey results also reveal that other convenience goods stores in Tisbury attract 1% of first choice main food trips from residents of Zone 5, 1% of first choice top-up trips and 14% of second choice top-up trips.

4.235 In relation to comparison goods shopping, Tisbury records the following market shares from residents of Zone 5:

- 5% share of first choice trips for furniture/floorcoverings/home furnishings
- A 1% share of first choice DIY trips
- A 1% share of trips for domestic appliances and smaller electrical goods
- 11% share of second choice trips for books, CDs and DVDs
- A 16% share of first choice trips for health and beauty goods
- A 1% share of trips for recreational goods

4.236 In relation to accessibility, the main off-street car park in Tisbury is located on The Avenue, which is a short walk to the east of the central area. This facility can accommodate 46 vehicles and provides free parking all day. Bus stops in and around the central part of Tisbury can be found at The Square and are visited by services

which travel to and from Wilton, Salisbury, Dinton and Warminster. Tisbury also has a railway station which is visited by services travelling to Salisbury and Exeter.

4.237 Tisbury also benefits from a 'made' Neighbourhood Plan (2019). Policy EB1 indicates that the retention of retail and public buildings within the centre of Tisbury is considered vital to its local service centre status. Paragraph 85 highlights the opportunity to redevelop the former Magistrates' Court and Police Station to support small businesses or an extended retail offer.

4.238 The above information indicates that Tisbury serves a localised function, concentrating primarily on top-up food shopping trips and a reasonably strong service role. In our opinion, it is performing a role commensurate with its role as a local service centre.

Trowbridge

Structure

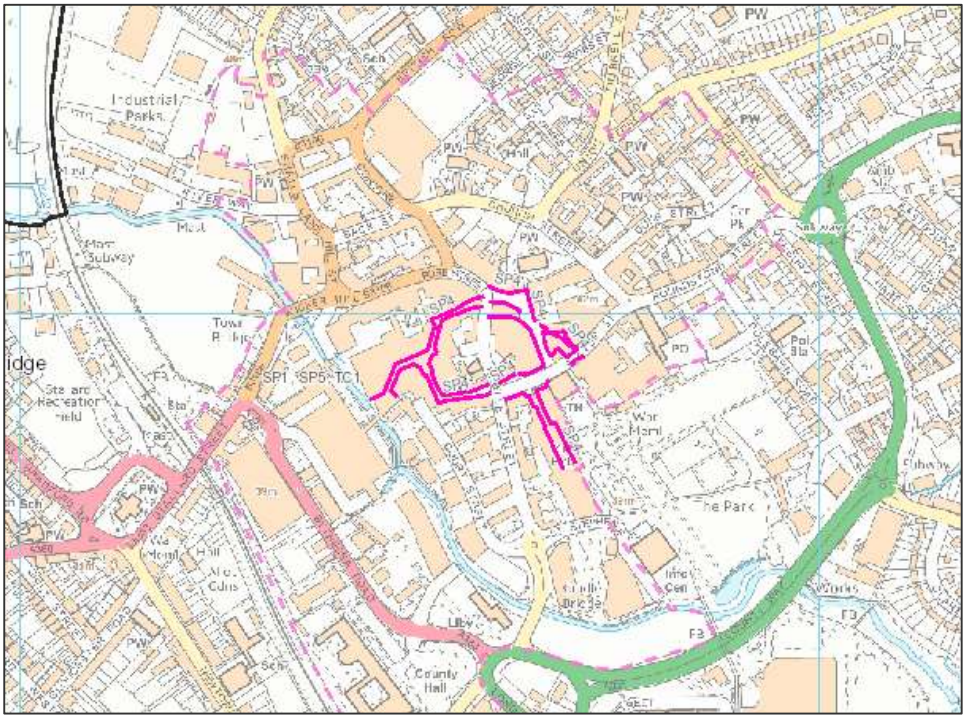
4.239 Trowbridge is the county town of Wiltshire and is located on the River Biss in the west of the county, 8 miles south-east of Bath. The 2011 census estimated the population of Trowbridge to be 33,108. Trowbridge is classified as Principal Settlement by the adopted Wiltshire Core Strategy.

4.240 The Wiltshire policies map denotes the following relevant boundaries / areas:

- Primary shopping area: the primary shopping area includes Fore Street and Market Street, as well as the Shires and Castle Place Shopping Centres.
- Commercial area boundary: this boundary covers a much larger area than the above, extending to Back Street and the Sainsburys supermarket in the north, Bythesea Road in the west, St Stephens Place in the south (including the recently developed leisure development and the Marks & Spencer Simply Food store) and along Silver Street in the east.

4.241 An extract from the development plan policies map showing these designations is contained in Figure 4.15 below.

Figure 4.15: extract from development plan policies map for Trowbridge town centre[22]



4.242 Over the past several years Trowbridge has been subject to a number of regeneration initiatives including a Masterplan published in 2014 and a town centre framework document currently in preparation. The 2014 Masterplan followed an Urban Design Framework in 2003 and included a number of public realm and accessibility improvements alongside a number of development opportunities.

Diversity of Uses

4.243 Table 4.15 below compares the retail land use profile of Trowbridge town centre between 2012 and AY's updated land use survey in early 2020. The data contained in the table is taken from Experian GOAD's survey of the town centre in 2012 and AY's updated survey of the latest GOAD survey in 2020.

Table 4.15: land use composition of Trowbridge town centre

	2012			2020		
	No.	**%**	**UK Ave**	**No.**	**%**	**UK Ave**
Convenience	21	8.0	8.5	21	7.4	10.1
Comparison	102	38.8	41.5	94	33.2	36.7
Service	87	33.1	35.2	113	39.0	39.0
Other	8	3.0	1.1	7	1.2	1.2
Vacant	45	17.1	13.6	48	17.0	13.0
Total	263	100	100	283	100	100

Source: Experian GOAD and Avison Young

[22] Primary retail frontage shown as continuous pink line and wider commercial area shown as dotted pink line.

4.244 The data in the above table indicates that there has been no material change in the number of convenience goods retailers in the town centre over the past several years. The proportion of retailers in this sector remains below the national average.

4.245 In line with the national trend over the past several years there has been a decrease in the proportion of comparison goods retailers and an increase in the proportion of service businesses. The proportion of comparison goods retailers in the centre remains around three percentage points below the national average, with the current proportion at 33% of all surveyed retail units in the town centre. The proportion of service uses has increased in line with the national average and, being below the national average in 2012, the proportion of service businesses is now in line with the national average.

Vacancies

4.246 The town centre's vacancy rate exceeds the national average (17% to 13%) and this has remained the position since the 2012 land use survey. There is not any particular clustering of vacant units although the persistent high level of vacancy in the centre could suggest that there is a surplus of retail floorspace in the town centre when compared with occupier demand.

Retailer Representation

4.247 Within the convenience goods sector, the largest retailer in the town centre is ASDA within the Shires shopping centre. The market share information for this store is contained below although the size of the store is such that is able to satisfy both main and top-up food shopping trips. Other convenience goods retailers in the town centre include an Iceland frozen foods store, also in the Shires shopping centre. As noted above, the overall proportion of convenience goods retailers in Trowbridge town centre is below the national average and in relation to the sub-categories there are below average proportions of butchers, greengrocers, off-licences and convenience stores.

4.248 Surrounding the core shopping area, Trowbridge has a significant amount of additional convenience goods floorspace. In recent years the former Peter Black site has been redeveloped to provide, amongst other uses, a Marks & Spencer Simply Food store, whilst on the northern edge of the centre there is a large Sainsburys supermarket. To the south-east of the town centre there is a large Tesco supermarket which, as will be described below, is the most popular main food shopping destination in the town.

4.249 In line with the other Principal Settlements in Wiltshire, Trowbridge has a reasonably high proportion of national multiple comparison goods retailers. The majority of national multiples can be found in the Shires shopping centre and the pedestrianized area of Fore Street and include: Peacocks, JD, Waterstones, Sports Direct, Boots, Clarks, Superdrug and WH Smith. With regards to the proportions of different types of comparison goods retailers in the town centre, the latest available survey data indicates that whilst, overall, there is a below average proportion of comparison goods retailers the proportion of clothing/fashion, sporting/recreational goods and health/beauty retailers is either in line with or above their respective national averages.

4.250 The proportion of service use businesses in Trowbridge town centre has increased over the past several years, with, at the time of the most recent survey, the proportion of health/beauty, financial services and estate agents above their respective national averages. The proportion of food and beverage uses (i.e. cafes, restaurants and take-aways) is below the national average.

Customer Views and Behaviour

4.251 The household survey commissioned for this Study provides the following data regarding food and non-food shopping patterns associated with Trowbridge town centre:

- Trowbridge lies in Zone 17 of the study area and the latest available market share data indicates that the town centre ASDA store attracts 14% of first choice main food shopping trips and 6% of second-choice main food trips.
- In terms of overall convenience goods shopping, existing stores retain 79% of first choice main food shopping trips from Zone 17 residents and 81% of second choice main food trips. The Tesco Extra supermarket located to the south of the town centre attracts around half of all first choice main food trips, although the Sainsburys store located to the north of the town centre attracts one quarter of second choice main food trips.
- In relation to comparison goods shopping, Trowbridge has a reasonably wide catchment in line with its role and function. The town draws a reasonably high market share of comparison goods shopping trips from Zones 7, 15, 16, 17, 18, 19 and 20. As noted above, Trowbridge lies in Zone 17 of the study area and attracts the following share of first choice shopping trips from residents of this zone:
    - Clothing/fashion – 27%
    - Furniture/floorcoverings/household textiles – 23%
    - DIY - 30%
    - Domestic appliances – 15%
    - Small electrical goods – 10%
    - Glassware, tableware, jewellery, watches – 21%
    - Books, CDs, DVDs – 26%
    - Health and beauty goods – 61%
    - Recreational goods – 26%

4.252 The survey results also provide the following information regarding leisure uses in Trowbridge:

- In relation to cinema-going, the new multiplex cinema at St Stephen's Place has made a significant difference to Trowbridge's ability to retain trips in the local area. The Odeon at St Stephen's Place attracts 88% of all trips from those residents of Zone 17 who visit the cinema, whilst it is also able to attract the following market shares from surrounding zones: Zone 15 (Devizes) 38%, Zone 16 (Westbury) 77%, Zone 19 (Bradford-on-Avon) 82%, Zone 20 (Melksham) 67%.
- Visits to food and beverage outlets in Trowbridge town centre during the day attract a 62% market share from Zone 17 residents, along with 33% of trips from Zone 16 and 11% from Zone 19. For those trips from Zone 17 (Trowbridge) residents which travel away from Trowbridge, Bath city centre attracts 13% of trips whilst Bradford-on-Avon has a 9% market share. For visits to food and beverage outlets during the evening,

Trowbridge town centre has a 63% market share amongst Zone 17 residents and also 35% of trips from Zone 16 (Westbury), 10% of trips from Zone 15 (Devizes) and 7% of trips from Zone 20 (Melksham).

- In relation to visits to health and fitness facilities, the survey results indicate that the most popular facilities are: Trowbridge Sports Centre (10%), Westbury swimming pool (8%), AnyTime Fitness in Bath (8%), Places Leisure in Trowbridge (8%), and Castle Place Leisure Centre in Trowbridge (30%). Castle Place Leisure Centre also attracts 6% of trips from Zone 16 (Westbury), 12% of trips from Zone 18 (East Bath) and 4% of trips from Zone 19 residents (Bradford-on-Avon).

Environmental Quality

4.253 Trowbridge town centre benefits from a large number of heritage assets including 249 listed building entries within the Town Centre Conservation Area. The River Biss and People's Park have played an important role in shaping the town.

4.254 Trowbridge owes much of its current form to the textiles and woollen industry. The industrial heritage of the town is clearly apparent in the landmark mill buildings which adjoin the river corridor and the People's Park. Ashton Mill is just outside of the Masterplan area but is a prominent feature in views from a number of positions within the town centre and is an important landmark gateway building for the town. Andil House is the largest and most memorable industrial building within the Central Areas of Opportunity. Andil House and those which surround it are symbols of the industrial heritage of the town as well as being the focus for the current town centre employment uses.

4.255 A high proportion of the building in this area are Listed and Trowbridge is fortunate to have retained significant elements of its historic core and traditional street pattern. Curved building lines, terminated views and varied street widths result in an informal sense of enclosure and create a friendly and attractive character at a traditional market town scale. The Town Hall and St James Church, as well as the other architecturally rich and prestigious buildings in-between, are important attractions and identify the historic status of the town.

Pedestrian Flows

4.256 As part of our visits to the town centre during the preparation of this Study, levels of pedestrian flow across the town centre were observed. The highest levels of flow were observed around the Shires shopping centre, Fore Street and Castle Street. Castle Place shopping centre was observed to have lower levels of pedestrian flow in line with its slightly detached location from the prime shopping area.

4.257 Despite it providing an important contribution to the varied nature of land uses in the town centre footfall to the St Stephen's Place leisure development during the day is relatively low. However, footfall around this area during the evening was observed to be much higher.

4.258 Finally, the Shires Gateway retail / leisure development on the western side of the town centre provides an additional driver of footfall. However, despite the provision of a signal-controlled pedestrian crossing and the presence of a number of national multiple retailers, footfall across Bythesea Road is not significant which is not aided by the Shires shopping centre 'turning its back' on the area to the west.

Occurrence of Crime

4.259 In order to understand the occurrence of crime within Trowbridge town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

Accessibility

4.260 With regards to public transport, Trowbridge has a railway station which is located a short walking distance to the north-west of the town centre. The station is visited by trains which travel to/from Bristol, Cardiff, Portsmouth, Swindon and Westbury.

4.261 The majority of bus stops in the town centre are located on Market Street, the southern end of Castle Street, Fore Street, Manvers Street and Stallard Street. These stops are visited by services which travel to Frome, Hilperton, Corsham, Bath, Midsomer Norton, Melksham, along with a regular circular town-wide service.

4.262 The public off-street car parks in the town centre include:

- Bradford Road – 24 spaces
- Broad Street – 33 spaces
- Church Street – 36 spaces
- Court Street – 78 spaces
- Lovemead – 165 spaces
- St Stephens Place – 446 spaces
- The Shires shopping centre – circa 1,000 spaces

Conclusions

4.263 Trowbridge remains one of the most popular retail destinations in Wiltshire with a reasonable market share across a broad range of comparison goods categories. The Gateway development on the western side of the town centre has helped to provide modern retail floorspace in addition to the Shires Shopping Centre whilst the centre also benefits from a large ASDA supermarket which attracts main food shopping trips. Since the 2012 Study the St Stephen's Place has contributed a significant amount of new leisure floorspace to the town centre, including a new cinema and food/beverage provision. The town now retains a large majority of cinema-going trips and has a strong leisure catchment which encompasses the surrounding (smaller) towns such as Bradford-on-Avon, Melksham and Devizes. The additional of further retail and leisure uses at Cradle Bridge (including a Marks & Spencer store) has also arguably provided a further positive impact upon the health and attractiveness of the town centre. These new developments have meant that Trowbridge has been the main focus for town centre development projects over the past several years and it is now likely, in our opinion, that the centre has reached its peak potential in terms of retail and leisure floorspace. The focus should now be placed upon retaining existing businesses and also diversifying under-used and vacant space, not least as the proportion of vacant units in the centre has remained well above the national average over the past several years. Overall, Trowbridge is considered to be a reasonably healthy town centre, no doubt

assisted by the presence of the Wiltshire Council offices, although the focus for the next stage of regenerating the town centre will be diversification.

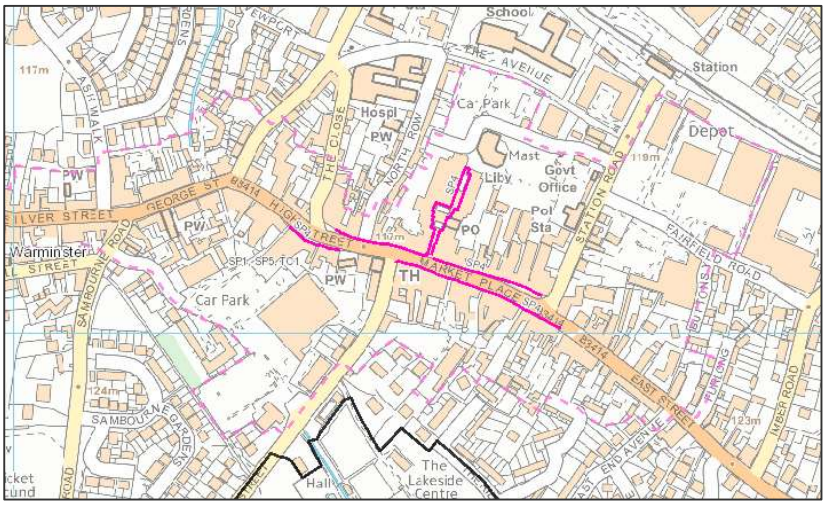
Warminster

Structure of town centre

4.264 Warminster is a market town located in the west of Wiltshire with a population of around 23,000 people. The centre is by-passed by the A36 and lies on the River Were and also benefits from a train station linking the town to the wider rail network to Bristol, Bath, Southampton and Portsmouth. Warminster town centre serves as the main hub for employment, retail and service provision to the surrounding military garrison and a rural catchment of 25 villages known as the Warminster Community Area.

4.265 The primary shopping area of Warminster town centre as defined by the adopted Policies Map follows a linear built form along High Street through to the shopping arcade at Three Horses Walk and extends onto George Street and Silver Street to the east and onto Market Place and East Street to the west. An extract from the development plan policies map showing these designations is contained in Figure 4.16 below.

Figure 4.16: extract from development plan policies map for Warminster town centre[23]



4.266 A Town Plan was prepared by Warminster Town Council in 2012 to guide development and the regeneration of the centre. The Town Plan identifies the following objectives to help 'strengthen and re-define the identity of the retail core' as summarised by the Core Strategy[24]:

- the provision of suitable premises for larger format comparison retailers
- rationalisation of parking provision
- improvements to public transport connectivity
- improved pedestrian linkages.

4.267 There is also a 'made' Neighbourhood Plan for Warminster with Section 7 dealing with the strategy for the town centre. Policy TC1 supports the regeneration of the town centre and specifically highlights the opportunities

[23] Primary retail frontage shown as continuous pink line and wider commercial area shown as dotted pink line.
[24] Wiltshire Core Strategy 2015

presented by the Central car park and the site of the old police houses. There is also an aspiration to upgrade the link between the western car park and High Street and promote works that improve the traffic flow, access and appearance of East Street.

Diversity of Uses

4.268 Table 4.16 below provides a summary of the retail land uses in Warminster between 2012 and 2020. The 2020 data .

Table 4.16: land use profile of Warminster Town Centre

	2012			2020		
	No.	%	UK Ave	No.	%	UK Ave
Convenience	12	6.4	8.5	16	8.4	10.1
Comparison	81	43.3	41.5	82	42.9	36.7
Service	68	36.4	35.2	66	34.6	39.0
Other	1	0.5	1.1	2	1.2	1.2
Vacant	25	13.4	13.6	25	13.0	13.0
Total	187	100	100	191	100	100

Source: Experian GOAD and Avison Young surveys

4.269 The above data shows that there has been an increase of around one third in the amount of convenience goods retailers in Warminster town centre over the past several years, from 12 to 16. At the time of the 2020 survey by AY 8.4% of all surveyed retail units were occupied by convenience goods retailers which is below the current national average of 10.1%.

4.270 In contrast to a number of other centres in Wiltshire, there has not been a reduction in the number of comparison goods retailers in Warminster town centre with the proportion of retailers in the centre remaining above the national average.

4.271 Similarly, in contrast to the national trend, there has not been an increase in the number / proportion of service uses over the past several years. The number of service uses has decreased from 68 in 2012 to 66 in 2020 and whilst the proportion of service uses was slightly above the national average in 2012 this has now fallen below the average.

Vacancies

4.272 Vacancies have remained constant over the past several years, at 25 of all surveyed retail units. This proportion of is around 13% of all surveyed units and this is consistent with the national average.

4.273 Vacancies occur through different parts of the centre although it is important to note that a number of vacancies can be found in the core retail area which should be an area for focus for the Council. These vacancies vary from the post-war Three Horseshoe Walk to several vacancies along Market Place and East Street.

Retailer Representation

4.274 Warminster is relatively unique amongst many Wiltshire towns in that all of the main foodstores can be found in and adjacent to the town centre. The national multiple retailers present are Morrisons, Lidl, Iceland and Waitrose which provide a good choice and range of grocery items. However, the centre has a limited number of small convenience stores with a below average proportion of bakeries and small convenience stores. The town centre does benefit from a weekly Friday market located next to Central car park.

4.275 Within the comparison goods sector national multiple retailers include Argos, Boots, Superdrug, Specsavers, Edinburgh Woollen Mill and WH Smith. Dorothy Perkins permanently closed down in 2016. As noted above, Warminster town centre has a proportion of comparison goods retailers which is six percentage points above the national average. The proportion of clothing/fashion retailers is well below the national average although the proportion of electrical, furniture/furnishings and health/beauty retailers are above their respective national averages. The amount of charity and pet store retailers are double the national average.

4.276 The proportion of service businesses in the town centre is around four and a half percentage points below the national average. National multiple businesses include a number of high street banks and building societies Lloyds, Halifax, Nationwide and Barclays. In relation to food and beverage uses there is a Domino's pizza take-away and Costa coffee shop. The proportion of food and beverage outlets in the centre are below the national average (13.1% v 17.9%) whilst the proportion of health and beauty businesses (14.1%) is above the national average (11.8%). The proportions of banks/building societies and estate agents in the centre are below their respective national averages.

Customer Views and Behaviour

4.277 The results of the household survey commissioned for this Study reveal the following information regarding the market share of Warminster town centre:

- Warminster lies in Zone 8 of the study area (see plan at Appendix XX). The survey results indicate that circa 65% of first and second choice main food trips are retained by stores in the town, with the Morrisons achieving the highest market share at 35%. The main beneficiary of first choice main food trips which 'leak' outside of Zone 8 is Frome. Circa 60% of top-up food shopping trips from Zone 8 residents are retained by foodstores in and around Warminster town centre.
- In relation to comparison goods shopping trips, Warminster town centre has the following market shares for first choice shopping trips across the following categories from Zone 8 residents:
    - Clothing / fashion / footwear – 11%
    - Furniture / floorcoverings / home furnishings – 12%
    - DIY goods – 20%
    - Domestic appliances - 25%
    - Small electrical goods - 13%
    - Glassware/tableware – 28%
    - Books, CDs, DVDs – 31%
    - Health and beauty goods – 83%
    - Recreational goods – 28%

4.278 In relation to leisure uses, the household survey results reveal the following:

- In relation to cinema-going, the Athenaeum in Warminster attracts only 2% of trips from Zone 8 residents which is no doubt related to the small size of this facility when compared with larger facilities in surrounding towns. 'Leaked' trips flow to Frome (33%) and the Odeon in Trowbridge (53%).
- The household survey results indicate that Warminster town centre attracts 43% of trips associated with daytime trips to food and beverage outlets from the residents of Zone 8. The town centre also attracts a 19% share of daytime trips from residents of Zone 16 (Westbury). In relation to evening food and beverage trips, Warminster town centre has a 38% share of trips from Zone 8 residents, with 11% travelling to Trowbridge, 10% apiece to Frome and Salisbury and 7% to Bath city centre. In contrast to the daytime, Warminster town centre only attracts 5% of trips from Zone 16 with residents of this zone preferring to travel to either stay in Westbury (22%) or travel to Trowbridge (35%).
- For health and fitness, the most popular facilities amongst Zone 8 residents are: Harridges health and fitness studio (31%) and Warminster sports centre (53%). The sports centre also attracts 4% of trips from residents of Zone 16 (Westbury).
- For cultural activities, one third (30%) of Zone 8 residents travel to Salisbury, with 20% travelling to Bath city centre and 12% indicating that they visit the Athenaeum Centre in Warminster.

Environmental Quality

4.279 A significant proportion of the town centre falls within the Warminster town centre Conservation Area and a large number of buildings are either nationally listed or locally listed. Warminster town centre's compact linear form is built around the historic route (the B3414) which connects onto the A36 bypass and A350. This main route passes through Silver Street, George Street, the High Street, Market Place and East Street, which is the retail core of the town centre. The pavement areas along the primary shopping area are sufficiently wide enough to create a pleasant pedestrian environment and it is complemented by seating areas, hanging baskets of flowers and street furniture. Fairfield road leading to Lidl, B & M Home Store, Poundstretcher and Waitrose & Partners generates a significant volume of traffic and the pavements on this road section are narrow and do not allow pedestrians of all abilities to safely pass each other.

4.280 Shopfront improvements are required on a number of units outside the primary shopping area on secondary roads such as East Street and George Street in order to maintain or enhance the character and appearance of the town centre as a collective and to increase the footfall into these shops. The arcades at Three Horseshoes Walk and the Cornmarket provide a calm, clean and sheltered area within the centre, albeit the former does not necessarily add to the overall attractiveness of the town centre.

Pedestrian Flows

4.281 As part of our visits to Warminster town centre during the preparation of this Study, levels of pedestrian flow across the different parts of the town centre were observed and recorded. The area around Market Place and Three Horseshoe Walk consistently had the highest levels of vitality. The presence of the town centre /

edge of centre foodstores and large retail units are also able to increase footfall / visits which are of a material benefit to the town centre.

Occurrence of Crime

4.282 In order to understand the occurrence of crime within Warminster town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

Accessibility

4.283 Warminster town centre benefits from good road connections via the A36 bypass and the A350 into the town centre. The B3414 route within the centre is an important arterial road to the A36 and the A350 road. Visitors travelling by car have access to extensive surface car parks including:

- Central Car Park – providing 191 spaces, no charge for 2 hours
- Chinns Car Park – providing 58 spaces and is free for 2 hours
- Emwell Street – with 17 spaces, no charge for 2 hours
- Western Car Park – providing 160 spaces and is free for 2 hours
- Weymouth Street Car Park – providing 19 spaces, no charge for 2 hours and,
- Warminster Station Car Park – providing 111 spaces at £2.30 for 2 hours

4.284 In terms of public transport, the train station lies within a 10 minute walk from the town centre and it connects the town to the wider rail network to Bristol, Bath, Southampton and Portsmouth. Buses to and from Boreham Field, Chitterne, Mere, Masefield Road, Frome, Suttern Veny and Salisbury, serving Warminster Community Area and beyond are accessible on the hour.

Conclusions

4.285 Overall, Warminster is considered to be a relatively healthy town centre. The proportions of retail and service uses in the centre have been consistently in line with their respective national averages over the past several years, which is also the case for the proportion of vacancies. Vacancies occur in all centres although it should be noted that Warminster has a higher than usual number in its core retail area. However, one of the particular advantages for Warminster town centre is the presence of all of the town's main foodstores in and around the centre. This helps to drive footfall and is a particular benefit to the centre.

Westbury

4.286 Westbury is a historic market town situated in the west of Wiltshire between Trowbridge and Warminster and has a population of over 18,000 people. The town centre is accessed via the strategic A350 and it also benefits from a train station which links the town to Bristol, Bath, Portsmouth and Exeter. The majority of retailing within the town centre is focussed on the High Street, Maristow Street and at the Market Place. Secondary streets including the east of Haynes Road and Edward Street also provide a level of retail uses. Westbury town centre is also currently subject to the preparation of a masterplan which will set out a vision for the future of the centre and key urban design opportunities.

4.287 Table 4.17 below provides a summary of the retail land uses in Westbury between 2012 and AY's updated survey in early 2020.

Table 4.17: land use profile of Westbury Town Centre

	2012			2020		
	No.	%	UK Ave	No.	%	UK Ave
Convenience	8	8.8	8.5	5	6.3	10.1
Comparison	34	37.4	41.5	27	33.8	36.7
Service	37	40.7	35.2	36	45.0	39.0
Other	0	0.0	1.1	0	0.0	1.2
Vacant	12	13.2	13.6	12	15.0	13.0
Total	91	100	100	80	100	100

Source: Experian GOAD and Avison Young surveys

4.288 The above data indicates that there has been a noticeable reduction in the number of surveyed retail and service uses/units in the centre between 2012 and 2020, from 91 to 80. There have been reductions across the convenience and comparison retail sectors along with a small reduction in the number of service uses. The proportions of convenience and comparison retail uses in the centre are now below their respective national averages although the proportion of service uses remains above the national average. The number of vacancies in the centre has not changed between 2012 and 2020 and remains at 12. Due to the reduction in the number of surveyed retail and service uses in the centre over the past several years the proportion of vacancies is now two percentage points above the national average.

4.289 With regards to convenience goods retailing, the household survey data indicates that Westbury as a whole retains 52% of first choice main food trips from residents of Zone 16 (the zone in which the town lies) along with 61% of second choice main food trips. The main foodstore in Westbury town centre is the Morrisons on Edward Street which attracts 19% of main food trips and 27% of second choice trips from Zone 16 residents. Westbury is able to retain 84% of top-up food shopping trips from Zone 16 residents. The Morrisons store in the town centre attracts 29% of first choice and 19% of second choice top-up food trips. With regards to the wider set of convenience goods retailers in Westbury town centre, the proportions of bakeries and butchers are higher than their respective national averages but the proportions of grocery stores and newsagents are below average.

4.290 In the comparison goods retail sector, the only notable national multiple retailer is a Boots on High Street. As noted above, the proportion of comparison goods retailers in the town centre is three percentage points below the national average, with the proportion of clothing/fashion, electrical and home furnishing/luxury goods retailers below their respective national averages. The proportion of charity shops in the centre is well above the national average. In relation to the market share of comparison goods stores in Westbury town centre, the survey of household shopping patterns indicates the following share of first choice trips amongst Zone 16 residents interviewed as part of the survey:

- Clothing/fashion – 3%
- Furniture/floorcoverings/home furnishings – 9%
- DIY – 25%

- Domestic appliances – 6%
- Small electrical goods – 1%
- Glassware/tableware – 8%
- Books, CDs, DVDs - 9%
- Health and beauty goods - 47%
- Recreational goods – 13%

4.291 With regards to accessibility characteristics in and around the town centre, Westbury lies on the A350 which is the main route between Trowbridge and Warminster. The A350 is also a key route between the M4 and the south coast, around Poole and Bournemouth. Car parking is provided adjacent to the Morrisons store (circa 150 spaces), Westbury Leigh (43 spaces), Westfield House (24 spaces), High Street (120 spaces) and Warminster Road (89 spaces). The main bus stops in and around the town centre are located on High Street, Edward Street and Haynes Road. These stops are visited by bus services which travel to and from Devizes, Trowbridge, Frome, along with a circular town service.

4.292 The built environment in Westbury town centre is varied. High Street comprises a series of terraced post-war properties along a street which is semi-pedestrianised. The quality of property along High Street is modest but not particularly attractive. This is the most modern part of the town centre with properties along the A350 and Edward Street comprising mostly pre-war terraced and semi-detached examples. These are the more attractive parts of the town centre although many parts of these areas are more residential in nature.

4.293 In order to understand the occurrence of crime within Westbury town centre, we have obtained data from Wiltshire Police. This data is contained in Appendix III.

4.294 Overall, Westbury town centre is considered to have a modest level of health but would appear a number of challenges. Vacancies in the centre have not fallen between 2012 and 2020 and the proportion of vacancies in the centre is now above the national average and now comprise around one third of all surveyed units. Westbury's catchment is limited by the reasonably close proximity of Warminster, Frome and Trowbridge which has materially larger retail offers. The town loses a substantial amount of food and non-food shopping trips to each of these three towns.

Wilton

4.295 The final centre subject to our health check assessment is Wilton. Wilton lies on the north-western edge of Salisbury and is classified as a local service centre in the settlement hierarchy. Wilton is a town which is now very close to forming part of the wider Salisbury conurbation and has a history dating back to Anglo-Saxon times. Wilton has a mixture of building styles around its central area although Wilton House is one of the most iconic buildings. The development plan policies map does not define any shopping and/or 'town centre' boundaries for Wilton and therefore AY's survey of retail and service uses in the central part of Wilton has concentrated upon North Street, Silver Lane, South Street and West Street.

4.296 Our land use survey of the centre conducted in early 2020 found that there were 21 retail and service units in the central part of Wilton. These uses include two convenience goods retailers, eleven comparison goods

retailers, six service uses and two vacancies. Outside of the centre, Wilton also has a shopping village which has a range of comparison goods retailers along with health and beauty uses and a café.

4.297 Wilton lies in Zone 4 of the study area which also contains Salisbury and therefore the survey results in relation to Wilton should be read and understood in this regard. The survey results indicate that the Co-op convenience store on North Street has a 1% of main food shopping trips from Zone 4 residents, whilst this store has 2% share of top-up shopping trips.

4.298 The household survey indicates that Wilton has a low share of comparison goods shopping trips from residents of Zone 4, including:

- Clothing and fashion – 1% of first choice trips and 2% of second choice trips
- Furniture/floorcoverings/home furnishings – 1% of first choice trips
- DIY – 3% of second choice trips
- Health and beauty goods – 4% of second choice trips

4.299 The two main off-street car parks in Wilton can be found at Market Place (49 spaces) and South Street (64 spaces). Both facilities are free, with the former having a maximum two hour stay and the latter not subject to any restrictions. The main bus stops in the central part of Wilton can be found at Market Place, West Street and South Street. These stops are visited by services which travel to Salisbury, Tisbury, Ditchampton, Bulbridge and Quidhampton.

5. Need Assessment

Introduction

5.1 Part (d) of paragraph 85 of the NPPF notes that local authorities should "*allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead*". The assessment of 'need' for main town centre uses is also mentioned in the PPG although neither the NPPF (2019) or PPG offer any further guidance as to how 'needs' should be examined and assessed.

5.2 Traditionally, assessments of need for retail floorspace have considered both quantitative and qualitative factors. This was the approach advocated by the 2012 version of the NPPF and PPS4 before it. We have agreed with the Council that the examination of quantitative and qualitative issues should remain the focus for this Study and we outline (A) the basis for our assessment, and (B) the results of our assessment in turn below.

5.3 This section of the Study outlines the quantitative and qualitative need for convenience and comparison goods retail floorspace in the main settlements across Wiltshire[25] along with a quantitative assessment of the need for food and beverage floorspace in the larger of the main settlements[26].

Quantitative Retail Need Assessment - Data Sources and Assumptions

Introduction

5.4 This sub-section of the Study outlines the various data sources and assumptions which have been adopted in order to prepare our quantitative need forecasts. Quantitative need is conventionally measured as expenditure capacity, i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area. Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increases in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.

5.5 Quantitative capacity forecasts are reliant on a series of data sources which are regularly updated in response to various factors including UK economic forecasts and the performance of retailers. The section covers the following areas:

- Study area
- Population data
- Per capita retail expenditure forecasts
- Data on shopping patterns for convenience and comparison goods shopping
- Commitments for retail floorspace
- Floorspace efficiency levels
- Benchmark turnover levels of existing and committed retail floorspace
- The timeframe for the assessment and the use of the quantitative capacity forecasts

[25] These comprise the former Class A1 category, which is now Use Class E(a)
[26] Formerly Use Classes A3 and A4 and now Use Class E(c) for the former and sui generis for the latter

Study Area and Shopping Patterns Data

5.6 Given the scale of the county of Wiltshire, along with its wider catchment, the study area for this assessment is required to be necessarily large. The study area will need to capture shopping patterns associated with each of the main town centres and the average spending levels of those people who use these centres. A plan showing the extent of the study area and the constituent sub-zones is contained at Appendix I.

5.7 As set out in earlier sections of this Study, a survey of household shopping patterns has been undertaken in order to inform both this quantitative assessment and the town centre health checks. The survey has been structured to collect data on the following convenience and comparison shopping activities:

- First choice and other main food shopping destinations
- First choice and other top-up food shopping destinations
- First and second choice destinations for the following types of comparison goods:
  - Clothing and fashion goods
  - Furniture, floorcoverings and household textiles
  - DIY goods
  - Domestic appliances
  - Smaller electrical goods
  - Glassware, tableware, jewellery, watches
  - Books, CDs and DVDs
  - Health and beauty goods
  - Recreation and luxury goods
  - Gardening goods

5.8 The study area matches the study area for the 2011 Study with the following refinements:

- The study area has been split into 28 separate zones in order to capture specific shopping patterns associated with individual settlements and the surrounding area.
- In order to ensure that an appropriate level of data is collected for this Study, we have made two amendments to the survey area / zones from the 2010 household survey. First, we have amalgamated Zones 1 and 2. Second, we have split Zone 23 in the 2010 survey which encompassed Calne and Royal Wootton Bassett into two separate zones, in order to ensure that a representative sample of shopping habits from both settlements is recorded for the purposes of this Study.

5.9 Notwithstanding the above refinements, the ability to retain the same survey area zones as the previous research allows for a consistent time-series comparison to be made, showing how market shares and shopping patterns for food and non-food goods may have changed over time.

5.10 The results of the household survey have been weighted against the age profile of each individual zone and have been summarised in Table 4 at Appendix II (for convenience goods shopping) and Table 6 at Appendix II (for comparison goods shopping).

5.11 For the purposes of our assessment, 'don't know' and 'don't do' responses have been removed from the results and the market share data re-based.

5.12 In order to ensure the full impact of shopping via the internet is taken into account, our quantitative assessment retains the market share data associated with this shopping channel.

Timeframe for the Quantitative Assessment

5.13 The timeframe for the new Wiltshire Local Plan has been set to conclude by 2036 and our assessment has been framed to cover this period (from 2020).

5.14 The February 2019 version of the NPPF indicates that local authorities should "allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead". The PPG also notes, in relation to the preparation of town centre strategies, that "*Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed*".

5.15 Therefore, there is no compulsory requirement for this quantitative assessment to run all the way to 2036 although we have done so in order to provide some broad informal guidance. Capacity forecasts are therefore provided for 2020, 2025, 2030 and 2036. However, it should be noted when absorbing the content of our quantitative assessment that the forecasts will become less reliable over time due to nature of the economic forecasts which will be influenced by external factors some of which will be unforeseen. As a consequence, we would recommend that the first five years of the assessment is the focus for the retail strategy (i.e. up to 2025) and that the forecasts are reviewed every five years. The 2030 and 2036 forecasts are, therefore, indicative.

Population

5.16 In line with the approach taken in the 2011 Study, our quantitative need assessment adopts population forecasts provided by Experian. Population levels for each of the study area zones are shown in Table 1 at Appendix II. As part of the decision to use Experian's population forecasts, the level of growth across each of the study area zones has been discussed with Council officers and it has been concluded that, at the present time, these forecasts are reasonable. However, we recommend that the scale and distribution of population growth across the study area is kept under review as the preparation of the Local Plan Review progresses.

Per Capita Retail Expenditure Data and Future Forecasts

5.17 New per capita retail expenditure data has been obtained from Experian. The data provided is set at a 2018 base level and has been projected forward based upon the forecast change in per capita retail expenditure for convenience and comparison goods is based upon advice within Experian's Retail Planner Briefing Note 18, published in October 2020. These latest forecasts take into account, at the time of finalising this report, the latest available data on the potential implications of the COVID-19 pandemic on the retail sector.

5.18 Per capita retail expenditure for convenience and comparison goods is shown in Tables 2a-2d at Appendix II.

5.19 It should also be noted that Section 3 of this Study outlines the potential scenarios as the UK economy eventually moves out of the peak of the crisis although it is very likely that the situation will continue to evolve over the next 12-18 months. As a consequence, we would recommend that the latest available forecasts from Experian are adopted for the purposes of this Study although there is a need to ensure that the forecasts are kept under review at appropriate intervals during the preparation of the Local Plan Review.

Commitments

5.20 Data on relevant Class A1 retail commitments has been obtained from the Council and is shown in Table 9 at Appendix II.

Benchmark Turnover Levels

5.21 Within previous retail studies across Wiltshire two different approaches were taken for benchmark turnover levels for the convenience and comparison goods assessments. For convenience goods floorspace, it is common for the benchmark turnover of a selection of existing floorspace to be calculated using the existing net floorspace and company average sales densities for individual national multiple retailers and an assumed average for other convenience goods floorspace in defined 'town centres' and elsewhere. We remain with this approach in this Study and have:

- updated the sales density information for named national multiple retailers using the latest research undertaken by Verdict and Mintel[27]; and
- including data on new store openings since the previous studies.

5.22 For the comparison goods assessment, we remain with the previous method whereby the benchmark turnover is set to match the total turnover potential of existing stores at the base year of the assessment (i.e. 2020).

Floorspace Efficiency

5.23 Finally, our convenience and comparison goods capacity assessments both make an allowance for changes in floorspace efficiency over the assessment period. The assumptions that have been made are taken from recommendations made by Experian in its Retail Planner Briefing Note (Note 18, October 2020).

Market Share Levels

5.24 As noted above, the current market share levels shown in the 2020 baseline analysis are taken from the household survey commissioned for this Study. The capacity tables (Tables 10a-10p and Tables 11a-11p) show the overall market share of stores in each settlement. This market share is based upon 'physical' stores in each settlement and is influenced by the current (2020) market share of internet shopping; again, taken from the 2020 household survey.

[27] Retail Rankings, 2017 edition

5.25 However, in order to take into account how shopping via the internet in the future may have an influence on retail expenditure available to 'bricks and mortar' stores in the main settlements, our analysis is based upon an amended market share over the assessment period. This is particularly important given the on-going effects of the COVID-19 pandemic which has seen a significant uplift in the amount of retail spending in 2020 via the internet.

5.26 Whilst the latest forecasts from Experian suggest a modest 'bounce back' from 2021 onwards once economic conditions become more settled, the forecasts nevertheless show a sustained increase in spending via the internet particularly for comparison goods. As a consequence, the market share levels from the 2020 household survey have been refined in order to take into account this trend and thus provide a realistic estimate of the level of convenience and comparison goods retail expenditure which is available to 'bricks and mortar' stores in the main settlements in Wiltshire.

Basis for quantitative capacity forecasts

5.27 For the avoidance of doubt, the quantitative capacity forecasts outlined in this section are for the whole of each town, not just town centres.

5.28 We now turn to the assessment of need for each of the main settlements.

Assessment of Class A1 Retail Need – By Settlement

Amesbury

5.29 The convenience goods capacity assessment for Amesbury is contained in Table 10g at Appendix II and indicates the potential for net additional floorspace in the town between 2020 and 2036. At the time of preparing the 2011 Study the main foodstores in Amesbury were a Co-op in the town centre and an out of centre Lidl store. Since that time there have been a number of changes and additions in foodstore provision. ALDI have taken over the more modern of the Co-op stores in the town centre, the Tesco supermarket has now been developed and a Home Bargains (which includes an element of food sales) at Solstice Park.

5.30 Our analysis at Table 10g takes into account these changes/additions in the benchmark turnover figure for existing stores (£63m) and this can be compared to a total turnover potential for these stores of £74.4m. Therefore, the analysis is showing a small surplus in capacity equivalent to either £11.4m or an indicate floorspace capacity of 953sq m net sales area. Based upon a constant market share over the assessment period, taking into account the influence of internet shopping, this indicative floorspace capacity falls to 734sq m net at 2025 and 796sq m net at 2030. These levels of quantitative capacity are too small to accommodate a new modest sized foodstore and are more akin to medium sized convenience store such as a Co-op, Tesco Express or Sainsburys Local.

5.31 Turning to qualitative aspects of convenience goods provision in Amesbury, there are now three reasonably sized foodstores, along with town centre local independents and a value orientated offer in the Home Bargains. There has been a material improvement in provision since the 2011 Study and this is reflected in the level of retention of main and top-up food shopping trips. 71% of first choice main food trips are now retained in Zone 9 (the zone in which Amesbury sits) whilst circa 60% second choice trips are also retained. In relation

to top-up food shopping the retention rate is around 60%. Bearing in mind the proximity of Salisbury and the reasonably high usage of online grocery deliveries, we consider these to be good retention rates and a sign that the local population is generally content with the current level of provision in the town.

5.32 The quantitative comparison goods capacity forecasts for Amesbury are contained in Table 11f at Appendix II and show the limited amount of future additional capacity in the town. This capacity is limited due to the low market share of Amesbury which is held constant over the assessment period. The obvious way to attempt to increase future capacity is via an increase in market share which would be driven by a material increase / change in comparison goods floorspace provision. We consider this to be difficult to achieve due to the significant influence of Salisbury over wider comparison goods shopping patterns across South Wiltshire. Based upon Amesbury being able to maintain its current market share, Table 11f indicates that there will be capacity for an additional 157sq m net by 2025 and 122sq m net by 2030. Based upon these levels, and also taking into account the issues outlined above, we recommend that there is no need for the Council to plan for any additional comparison goods floorspace in Amesbury.

Bradford-on-Avon

5.33 Our assessment of quantitative capacity for convenience goods floorspace for Bradford-on-Avon can be found in Table 10h at Appendix II. The table indicates that stores in Bradford attract £31.4m of convenience goods expenditure from study area residents and when a small allowance is made for expenditure inflow this provides a total turnover potential of £31.7m. This should be compared with the benchmark turnover of existing convenience goods stores of £32.1m and thus indicating that there is a small over-supply of floorspace in the region of -43sq m net. This over-supply will remain across the whole of the assessment period. The lack of quantitative need is matched by the current range and choice of provision in Bradford-on-Avon, bearing in mind the size of the town and the nearby influence of Trowbridge. The household survey indicates that around half of first choice main food trips and around one third of second choice main food trips in Zone 19 (the zone in which Bradford-on-Avon lies) are directed to foodstores in Bradford-on-Avon. The retention of first and second choice shopping trips is much higher, at 78% and 69% respectively, which is unsurprising given the range of existing provision and the nature of this type of shopping. Given the proximity of Bath and Corsham it appears to us that whilst an increase in choice and competition is desirable, and there may be some interest from mid-sized foodstore operators, attempting to achieve these goals will need careful consideration in order not to impact upon the health of the town centre.

5.34 Table 11i at Appendix II outlines the level of quantitative capacity for comparison goods floorspace in Bradford-on-Avon. The table shows a low level of growing future capacity given the current low market share of the town comparison goods shopping trips. It shows that stores in the town, mainly the town centre, attract £13.7m of comparison goods expenditure from study area residents and is equivalent to a 0.3% market share across the whole of the study area. Bradford-on-Avon's niche offer means that it has a low market share, with single digit market shares amongst the clothing, furniture, DIY, Books, household and luxury goods categories. However, it does have a much higher market share for health and goods with a 31% share of first choice trips from Zone 19 residents and a 14% share of second choice trips from the same area. Bradford-on-Avon also has a 11% market share of recreational goods shopping trips from Zone 19 residents and a 23% share of trips for gardening goods and related products. The latter is likely to be driven by the presence of two horticultural nurseries in the local area, although £12m of the £13.7m of comparison goods expenditure spent in Bradford-on-Avon is spent in the town centre.

5.35 Table 11i indicates that Bradford-on-Avon will have a potential capacity for an additional 89sq m (net) comparison floorspace by 2025 and 78sq m (net) by 2030. In relation to qualitative aspects of provision, Bradford-on-Avon has very much found its own individual niche role, differentiating itself from the more mainstream towns of Trowbridge and Melksham, and also providing a smaller-scale complementary role to the spirit of arts/crafts/independent retailing in nearby Bath.

Calne

5.36 Table 10i at Appendix II shows the level of convenience goods expenditure which is being attracted by existing foodstores in Calne. It indicates that stores currently attract £54.9m of expenditure which is equivalent to a 1.7% market share across the study area. We have made a small (3%) allowance for expenditure inflow from outside of the study area, which gives a total turnover potential of £55.2m. This can be compared with a benchmark turnover of £58.1m, which indicates that there is a small over-supply of convenience goods floorspace of -350sq m net. Assuming a constant market share over the assessment period, and taking into account the influence of internet shopping, this over-supply will remain until 2036.

5.37 In relation to qualitative aspects of provision, there have been some changes since the completion of the 2011 Study which have seen a new out of centre Tesco store built and the closure of the town centre Co-op. Whilst this has been a loss to the town centre, the Tesco store has arguably improved the level of retention of food shopping trips in the local area with 70% of first choice main food trips and 63% of other main food trips from Zone 23a residents being retained in this zone. Therefore, in terms of overall quality across the town as a whole, we do not consider that there is a strong case for a significant amount of net additional floorspace, although the focus for qualitative aspects should focus on the town centre as, at present, out of centre stores have a higher market share of first choice main food trips, with the town centre becoming more of a first choice top-up food shopping destination.

5.38 Table 11e outlines the scope for additional comparison goods floorspace in Calne over the period to 2036. It is based upon a constant market share and assumes that turnover and benchmark turnover levels are in equilibrium at the base year (2020). Table 11e indicates that, based upon projected expenditure growth, there will be limited additional capacity, with 111sq m net at 2025, 89q m net at 2030 and 143sq m net at 2036. Given the size and function of Calne, the ability to make significant qualitative gains will be limited in our opinion. The influence of Chippenham, Swindon and Bath will dictate that the focus should instead be maintaining that quality of existing floorspace in order to retain existing businesses.

Chippenham

5.39 Table 10b at Appendix II outlines the assessment of quantitative capacity for convenience goods floorspace in Chippenham. It shows that stores across the town attract £199m of convenience goods expenditure from the study area, which is equivalent to a 6% market share. Table 5a indicates that around £106m of this total study area derived turnover comes from Zone 22 (the zone in which Chippenham lies) with additional expenditure being drawn from the Corsham and Calne zones.

5.40 Based upon a constant market share over the assessment period, and taking into account the influence of internet shopping, Table 10b indicates that there will be a 'surplus' level of convenience goods expenditure at 2020 of £22.7m, falling to £15.1m in 2025 and £17.5m in 2030. Based upon an indicative sales density of

£12,000/sq m[28], this is equivalent to a capacity for net additional floorspace capacity of 1,888sq m net at 2020, 1,254sq m net in 2025 and 1,451sq m net in 2030. Notwithstanding the observations made below regarding qualitative aspects of provision outlined below, it should be noted that, at the time of preparing this report, there are current (undetermined) planning applications for ALDI and Lidl stores in Chippenham. Should one of these applications be approved then this would soak up generally all of the forecast quantitative capacity over the assessment period.

5.41 Chippenham has long had a good range of convenience goods floorspace across the whole town. Over the past three decades this provision has been dominated by the Sainsburys and Morrisons supermarkets which are located on the western and northern edges of the town respectively. They draw from a wide area and have traditionally been the dominant main food shopping destinations. The town centre has a modest-sized Tesco along with a selection of local independents, an Iceland and a Little Waitrose store. Over the past couple of years these stores have been joined by an ALDI store at Langley Park and a Lidl store at Hungerdown Road. This now gives Chippenham a good range and choice of provision albeit skewed towards stores outside of the town centre. The strength in the quality of the convenience offer in the town is supported by the results of the household survey commissioned for this Study which show three quarters of first choice main food trips and three quarters of top-up trips being retained in Zone 22. This is reinforced by the attraction of main and top-up food shopping trips from surrounding areas/settlements.

5.42 Overall, therefore, we do not consider that there is a case for the Council to plan for new convenience goods provision in Chippenham the Local Plan Review. For the avoidance of doubt, this conclusion is based upon the current level of provision across the town, although choice and access to provision will be improved further should the Council decide to grant either of the currently proposed ALDI and Lidl foodstores (at Methuen Park and the former magistrates court site, respectively). Opportunities to re-dress the balance between the town centre and out of centre locations should, however, be explored and will discussed in the following site assessment section.

5.43 For comparison goods floorspace, Table 11b at Appendix II outlines the quantitative floorspace forecasts for Chippenham and indicates that stores across the town attract circa £256m of comparison goods expenditure from across the study area. We have made a small allowance equivalent to 3% of study area expenditure flowing into Chippenham and also adjusted the market share to allow for the changing influence of shopping via the internet, giving a total turnover potential of £239m. There are no significant comparison goods floorspace commitments to be taken into account in the analysis and therefore, Table 11b indicates that there is the potential for an additional 1,632sq m net floorspace by 2025, falling to 1,306sq m net by 2030.

5.44 In terms of the qualitative aspects of comparison goods floorspace provision, Chippenham town centre (as defined by Experian GOAD) has around 25,700sq m (gross) floorspace which means that this retail sector occupies around of all retail floorspace in the centre. This figure does include Hathaway Retail Park which lies in the secondary frontage and is within walking distance of the primary shopping frontage. In addition to this amount of town centre floorspace, the amount of out of centre comparison goods floorspace located outside of the town centre is circa 13,750sq m (gross). Whilst it may be suggested that recent new comparison goods retailers located outside of the town centre, such as Next, TK Maxx and B&M could be an influence/threat over its future health, they have provided significant additional choice and competition and have allowed

[28] amended over the assessment period to reflect forecast changes in floorspace efficiency

some retailers to locate in Chippenham that would not have had the opportunity to otherwise do so. As noted in the previous section of this report, the town centre's comparison goods sector has been able to increase its turnover between 2010 and 2020 from £114m to £152m[29] and whilst this is below the 2020 prediction the 2011 Study of £162m[30] it nevertheless indicates that the town centre has been able to increase its comparison goods turnover.

5.45 Looking now towards whether Chippenham has either a qualitative need for improvement or whether it can make a qualitative improvements, beyond those already achieved over the past decade, we consider that this is likely to be challenging on the basis of: (A) the current state of the UK non-foods sector and a general reluctance by a number of retailers to open new stores /expand existing floorspace; (B) the improvements that have already been made in recent year may comprise a natural limit for what the town can achieve (in terms of improvements) in the short to medium term; and (C) the continuing influence of larger competing destinations such as Bath, Bristol, Swindon Outlet Centre and Cribbs Causeway which will inevitably continue to draw some trips of comparison shopping trip away from the Chippenham catchment.

Corsham

5.46 Corsham lies to the west of Chippenham and is situated in Zone 21 of the study area. Table 10j at Appendix II outlines our assessment of the quantitative capacity for convenience goods in the town. The table shows that convenience goods stores in the town currently attract £12m of expenditure and this is being drawn primarily from Zone 21. After making a small allowance for expenditure inflow, and the changing influence of internet shopping, Table 10j shows that the total turnover potential of convenience goods floorspace (£12m) is below its equivalent benchmark turnover of £14.6m. This indicates a small over-supply of floorspace equivalent to -216sq m net at the present time. Based upon a constant market share over the assessment period, this over-supply will remain.

5.47 In terms of the quality, range and choice of convenience goods stores in Corsham, these include a medium sized Co-op store in the town centre, a smaller Co-op at Macie Drive, along with a selection of small stores in the town centre including newsagent, butcher, baker, Spar convenience store and a greengrocer. These stores provide an important day-to-day function for the local population. However, the size and retail offer of these stores, along with the influence of nearby Chippenham (and to a lesser extent Melksham), mean that they are able to attract only 5% of main food shopping trips from Zone 21 and retain one third of top-up food shopping trips. On face value, this suggests a qualitative case for improvement, which is supported by the neighbourhood plan for a second supermarket although care will need to be taken in terms of the location and scale of any such new store in order to protect the health of the town centre and also the finite level of expenditure capacity.

5.48 In relation to comparison goods shopping, this sector in Corsham is dominated by local independent traders who occupy small units and serve niche individual functions. They provide day to day shopping facilities for the population which seek to differentiate themselves from the wider retail offer in Chippenham. The qualitative aspects of provision in Corsham therefore need to be seen in this light and therefore there is nothing to suggest that any particular strategy needs to be adopted in order to change and/or expand the

[29] Both shown in 2018 prices, for consistency purposes.
[30] Again expressed in 2018

comparison goods retail sector in Corsham. It should, instead, be protected as far as practicably reasonable to do so via development management policies in the Local Plan Review.

Devizes

5.49 The quantitative capacity forecasts for Devizes are set out in Table 10k at Appendix II. The study area derived turnover forecasts for 2020-2036 are taken from Tables 5a-5d and indicate that, at the current year (2020), the study area derived turnover for all stores is £76.9m. After making a small allowance for expenditure inflow from outside of the study area and the influence of internet shopping, the total turnover potential (£77.4m) can be compared against the (lower) benchmark turnover of existing stores (£56.3m) to reveal the potential to provide, on a quantitative basis, net additional convenience goods floorspace in the town. This aggregate trading above benchmark level is mainly created by the Lidl, Morrisons and Sainsburys stores in the town trading above their respective benchmark levels. The difference between these two levels creates a 'surplus' of £21.1m which is equivalent to an indicate convenience goods floorspace capacity of 1,762sq m net sales area. Based upon a constant market share, Table 10l indicates that indicative floorspace capacity will change to 1,494sq m net in 2025 and 1,541sq m net in 2030.

5.50 Balanced against these quantitative capacity forecasts should be a series of qualitative issues. In respect of the market share and trading performance of existing floorspace/stores, we have already noted the strong trading performance of the Lidl, Morrisons and Sainsburys stores and it is to be noted that the store with best performance against benchmark is the Lidl store. Visits to these stores, however, do not suggest that they are collectively heavily over-trading. In relation to market share levels, the results of the household survey indicate that stores in Devizes are able to attract 70% of first choice main food trips from Zone 15 residents along with one quarter of first choice trips from Zone 14 (which contains Pewsey). Similar levels of market share can be found in relation to second choice main food destinations. For top-up shopping trips, Devizes' market share is higher at between 75%-81%. Where leakage occurs, this involves trips to Melksham and Trowbridge along with an 8% market share for internet grocery shopping for first choice main food trips.

5.51 The only large supermarket in the town is the Morrisons, which is complemented by the modest sized stores of Lidl and Sainsburys. There is however good choice and competition with Marks & Spencer and Iceland stores in the town centre, alongside a range of local independent niche stores. Moreover, a particularly positive characteristic about foodstore provision in Devizes is that all of the main stores (apart from Lidl) are or adjacent to the town centre and thus play an important role in its vitality and viability. Therefore, whilst there does not appear to be any particular qualitative deficiency in convenience goods provision in Devizes, there may be a quantitative case for additional provision. However, it will be important that any such new provision does not affect the health of the town centre, particularly as these will compete against stores such as Sainsburys and Morrisons. Therefore, we would suggest that opportunities for new provision are explored but potential options should be tested against their impact on the health of the centre.

5.52 Table 11l at Appendix II outlines our forecast quantitative capacity for comparison goods floorspace in Devizes. It draws upon the study area derived turnover levels for existing stores in the town provided by Tables 7a-7d and shows that, overall, Devizes attracts £59.1m of comparison goods expenditure at 2020. Including the comparison goods turnovers associated with the Sainsburys and Morrisons stores, the town centre has an annual study area derived turnover of £49.7m which is 84% of all comparison goods expenditure attracted to the town. Based upon a constant market share over the assessment period, and taking into account the

changing influence of internet shopping, Table 11l forecasts that there will be potential capacity for an additional 341sq m net floorspace by 2025 and 220sq m net by 2030.

5.53 In terms of qualitative indicators, Devizes town centre has a higher than average proportion of comparison goods retailers across a mix of local independent and national multiple retailers (with the balance in favour of the former). Comparison retail provision is generally concentrated in the town centre, apart from the large B&Q store on Hambleton Avenue. The household survey results indicate that the town is able to retain a good proportion of shopping trips from Zone 15 residents and also attract a high proportion of trips from Zone 14 (Pewsey) across most comparison goods categories and the retention rates in Zone 15 are arguably much better than towns of a similar size across Wiltshire. In light of these factors, it is our opinion that Devizes does not suffer any particular issues over the quality of its provision.

Ludgershall and Tidworth

5.54 Ludgershall and Tidworth are located in close proximity and the existing Core Strategy explains that they have complementary roles and are being planned for jointly. Zone 11 of the study area includes both settlements although the starting point for our assessment has been to consider convenience goods floorspace capacity levels separately in order to understand localised issues. The capacity assessments for both settlements are contained in Tables 10m and 10p and show that: (A) the balance between expenditure and benchmark turnover in Ludgershall is relatively even, with a total turnover potential of £7.1m and a benchmark turnover of £6.4m. The quantitative assessment indicates that the Co-op store is trading below benchmark whilst the Tesco Express trades above benchmark; (B) Tidworth's total turnover potential is well below the benchmark turnover of existing stores (primarily comprising the large Tesco supermarket and the Lidl foodstore). Table 10p suggests that the level of over-supply is in the region of -£17.7m.

5.55 Even when combined, the data would suggest that there is sufficient existing retail floorspace in the Tidworth / Ludgershall area to cater for demand from the local area. We do recognise that the Tidworth / Ludgershall area will also attract additional convenience goods expenditure due to a significant nearby military presence although even with this additional expenditure we do not expect there to become a quantitative requirement for any significant amount of new convenience goods floorspace.

5.56 In relation to qualitative matters, looking at the combined area overall, we consider that there is a good level of provision. The Tesco and Lidl stores offer a wide range of fresh, refrigerated, frozen and pre-packed convenience goods and Tesco and Co-op serve the day to day needs of Ludgershall residents (although these latter two stores are likely to be more popular for walk-in trade). Therefore, in terms of range and choice there is no particularly, nor is over-trading an issue to be rectified. The only area which could ideally be addressed is the balance between Tidworth and Ludgershall and there is no reason why qualitative reasons could not outweigh the lack of a quantitative need. However, an appropriate solution would need to be found where the provision of additional food floorspace does not harm either of the existing centres.

5.57 In relation to comparison goods, Tables 11l and 11p show modest levels of additional quantitative capacity over the assessment period:

- Ludgershall: 56sq m net at 2025, 47sq m net at 2030 and 72sq m net at 2036.
- Tidworth: 52sq m net at 2025, 45sq m net at 2030 and 72sq m net at 2036.

5.58 These levels of 'capacity' do not suggest that there is a need to allocate land to accommodate net additional comparison goods floorspace in these closely linked settlements. It is likely that any demand for such modest increases in floorspace can be accommodated in the 'churn' amongst existing properties which are likely to be focused upon local independent retailers.

Malmesbury

5.59 Malmesbury lies to the north of Chippenham and to the north of the M4 motorway and a reasonably short distance to the south-east of Tetbury. The 2011 Study recorded a very low level of retention for all convenience goods shopping trips in the town (Zone 26 of the study area) at 14% based upon a survey of shopping patterns undertaken in 2010. This level of retention in Malmesbury at that time was no doubt due to the level of foodstore provision. The town had a small town centre Co-op store and medium-sized Somerfield store (now also a Co-op) outside of the town centre. Since that time, the Council has granted planning permission for a new Waitrose supermarket to the east of the town centre and this store is now trading. The introduction of the Waitrose store has made a material difference in shopping patterns in the town with now 39% of all first choice main food trips and 31% of second choice main food trips remain in the town from Zone 26 residents. In relation to top-up food shopping this has always been higher than the retention of main food trips and Malmesbury can now retain over three quarters of such trips. In terms of the continued leakage of main food trips from Zone 26 residents, the main beneficiary remains Chippenham followed by Tetbury.

5.60 Table 10m at Appendix II indicates that convenience goods stores in Malmesbury attract £29.7m from residents of the study area. Unsurprisingly, most of this expenditure derives from Zone 26 (the zone in which Malmesbury sits) although it is clear that both main and top-up food shopping expenditure is also now being drawn from residents of Zone 22 (which includes Chippenham). After making a small allowance for expenditure inflow from outside of the study area, and the changing influence of internet shopping, Table 10m indicates that the total turnover potential of existing stores is £29.9m which can be compared with the benchmark turnover of £29.1m.

5.61 These figures suggest that the balance between supply and demand in Malmesbury is in general equilibrium although the Table 10m also includes the turnover of the proposed ALDI foodstore at Malmesbury Garden Centre for which the Council has now granted planning permission. The result of including this 'commitment' is that, based upon a constant market over the assessment period, there would be no requirement for any net additional convenience goods floorspace in Malmesbury. However, it should be noted that the opening of the ALDI store is likely to increase the market share of Malmesbury across the study area, partly because the new household survey evidence shows that local residents are leaving Zone 26 to show at the new ALDI store at Langley Park in Chippenham. Whilst such an increase in market share is likely, should the new ALDI store be implemented, it is unlikely to lead to a situation where there will become a quantitative need for net additional convenience goods floorspace in Malmesbury.

5.62 Turning to the qualitative aspects of convenience goods floorspace provision in Malmesbury, the opening of the Waitrose store has made a significant contribution to the choice and availability of convenience goods in the town. This has been demonstrated by the change in local food shopping patterns, along with the basic evidence of what goods can be provided. A further advantage of the Waitrose store is that it is walkable distance of the town centre and evidence provided in association with the recent ALDI and Lidl applications

demonstrates that this is the case. However, there is a reasonable case for a further qualitative improvement in convenience goods provision in Malmesbury in order to further reduce leakage levels.

5.63 Table 11n at Appendix II provides our quantitative capacity forecasts for comparison goods floorspace in Malmesbury. It indicates that stores in the town receives £15.9m of comparison goods expenditure from study area residents and the content of Table 7a at Appendix II indicates that the majority of this expenditure came from Zone 26, along with a smaller amount from Zone 22. Based upon a constant market share over the assessment period, and taking into account the changing influence of internet shopping, along with the small amount of comparison goods expenditure derived from outside of the study area, Table 11n indicates a capacity for an addition 112sq m net by 2025 and 92q m net by 2030.

Marlborough

5.64 Table 10n at Appendix II outlines our assessment of the quantitative capacity for convenience in Marlborough. As shown in the table, the town is assessed to currently attract around £39.9m of convenience goods expenditure from the study area, which is gained primarily from Zones 13 and 14. Marlborough lies in Zone 13 and gains 80% of its study area derived turnover from this zone. Making a small allowance for expenditure inflow from outside of the study area, and the changing influence of internet shopping, Table 10n indicates a total turnover potential of £40.1m which can be compared with the benchmark turnover of existing stores of £44.4m. As a consequence, there is a modest over-supply of convenience goods floorspace in Marlborough at the current year equivalent to circa 350sq m net. Based upon a constant market share over the assessment period, Table 10n forecasts that there will remain an over-supply of floorspace up to 2036.

5.65 In relation to the qualitative characteristics of convenience goods floorspace provision, the residents of Marlborough and its wider catchment are served by two stores: a Waitrose in the town centre and a smaller Tesco store at Marlborough Business Park. These stores are supplemented by smaller local independent stores, such as butchers and bakers, in the town centre. The household survey results indicate that convenience goods stores in Marlborough attract around half of all main and top-up food shopping trips from Zone 13. This, on face value, appears a little surprising given that the Tesco and Waitrose stores offer a wide range of goods and cover different parts of the grocery market spectrum. However, it should also be remembered that Zone 13 covers a wide geographic area and residents living in different parts of the zone are likely to be attracted, to one extent or another, by stores in other settlements such as Hungerford.

5.66 For a town of Marlborough's size, we consider that the range of provision, from a selection of local independent niche traders in the town centre, to the larger Waitrose and Tesco stores, provides good choice and competition and therefore we do not consider that there is any need, from either a qualitative or quantitative basis, to proactively plan for net additional convenience goods floorspace in Marlborough.

5.67 For comparison goods floorspace, Table 11o at Appendix II indicates that, overall, stores in Marlborough attract £39.0m from study area residents. Based upon a constant market share over the assessment period, Table 11o forecasts a modest level of additional capacity up to 2036, including 173sq m net at 2025, 450sq m net at 2030 and 765sq m at 2036. In relation to qualitative matters, Marlborough has a healthy town centre which is aided by its high quality built environment including the distinctive width of the High Street. For a town of its size, Marlborough clearly 'punches above its weight' in terms of the quality of shops and whilst existing

business will no doubt face pressures in the future, the quality and reputation of Marlborough suggests that no particular interventions are required in the Local Plan Review.

Melksham

5.68 Table 10f provides our forecasted quantitative capacity forecasts for convenience goods floorspace in Melksham. These forecasts are made on the same basis as the other main towns in Wiltshire whereby a constant market share over the assessment period is assumed. The table shows that convenience goods in Melksham attract £99.8m of convenience goods expenditure from the study area, which is equivalent to a 3% market share. After making a small allowance (£3m) for expenditure inflow, and adjusting for future forecast trends in internet shopping, the table shows that the total turnover potential of £100.5m is just slightly higher than the benchmark turnover of existing stores of £98.2m. This leads to a very small floorspace capacity at 2020 of 192sq m net. However, the level of capacity does not rise beyond this level over the assessment period.

5.69 Melksham has two reasonably large supermarkets – ASDA and Sainsburys – both of which provide a wide range of fresh, pre-packaged, refrigerated and frozen goods, along with a modest non-food offer. These are supplemented by reasonably sized ALDI and Lidl stores along with a Waitrose on Bath Road. Also within the town centre there is an Iceland on the High Street. In terms of a smaller scale top-up style convenience provision, there are also a series of Co-op and Tesco Express stores along with small local independent niche food stores in Melksham. These include three bakers, two butchers and a greengrocer.

5.70 Melksham lies in Zone 20 of the study area used for our quantitative assessment and household survey. The results of the survey show that stores in the town retain 77% of first choice main food trips and 85% of second choice main food trips. In relation to first and second choice top-up food shopping trips, the survey derived retention rates are 87% and 77% respectively. Given the competitive offer of nearby Chippenham and Trowbridge these retention rates are, in our opinion, considered to be good. They are also a sign that local residents appear to be satisfied with stores across the town.

5.71 Given (A) the good range of choice within the town at the present time; (B) the competition posed by Chippenham and Trowbridge; (C) the likelihood that some food shopping trips will be associated with stores elsewhere as part of commuter journeys, we do not consider that there is a particular requirement for the Council to plan for any net additional convenience goods floorspace in Melksham. The focus instead will be on ensuring that there are/remain good linkages between the Sainsburys, Waitrose and Lidl stores with the remainder of the High Street.

5.72 Turning now to comparison goods floorspace in Melksham, our quantitative assessment for potential future capacity is contained in Table 11g. The table shows that comparison goods stores in Melksham attract circa £57m of expenditure from study area residents and it can be seen from the contents of Table 7a (at Appendix II that the majority of expenditure derives from residents of Zone 20. Expenditure is also gained from other zones, including 18, 19 and 21 and, as noted in the previous chapter, the draw of expenditure from these wider areas is focused upon furniture and other items for the home which is likely to be heavily influenced by the out of centre Leekes department store.

5.73 Based upon a constant market share over the assessment period, and taking into account the Table 11g indicates that there will be potential capacity for a net additional 362sq m net at 2025, 278sq m net in 2030 and 408sq m net at 2036.

5.74 In terms of the quality of the offer, Melksham's offer is modest comprising a small number of national multiple retailers (including high street staples such as Boots and Specsavers plus 'value' retailers such as Savers, Poundstretcher, Peacocks and The Original Factory Shop) along with a range of small local independent niche retailers. The overall size of the comparison goods sector (circa 8,900sq m gross) comprises 37.6% of all surveyed floorspace and is below the national average of 42.4%. This is unsurprising given the proximity and wider influence of Chippenham and Trowbridge, both of which have much larger town centres and a considerable set of out of centre retail park stores. Therefore, the direction of travel for Melksham's comparison goods retail offer is likely to be one of 'differentiation' from these two nearby larger settlements, focusing upon how it can conveniently and easily serve the local population, giving them reasons not to travel elsewhere (which is true for not just comparison goods retailers but also the wider retail and service sectors).

Royal Wootton Bassett

5.75 Table 10c at Appendix II outlines the quantitative expenditure capacity assessment for Royal Wootton Bassett. It indicates that all existing stores, including the new ALDI store on the former Grange Land Rover garage, have a collective turnover of £17.8m at 2020. Whilst it would be expected that the new ALDI store will have had an impact upon the turnover of the other reasonably large foodstore in the town (Sainsburys), the survey-derived turnover estimate for Sainsburys has fallen considerably since the previous survey (which was commissioned to inform the recent Lidl foodstore proposal). After making a small allowance for expenditure inflow, Table 10c indicates that the total turnover potential of existing stores is well below their collective benchmark turnover of £28.8m. This leads to an over-supply of convenience goods floorspace at 2020 of circa -900sq m net and which will continue over the assessment period assuming a constant market share (and taking into account .

5.76 In relation to qualitative matters, the opening of the ALDI store in the past year has made a significant improvement to choice and competition in the town. Whilst the Sainsburys store provides a very important contribution to the health and attractiveness of the town centre, and sells a reasonably wide range of food and drink items, it has until recently been the only large foodstore. Whilst it is important to note that the ALDI store probably has not yet reached a settled trading pattern, the latest survey evidence suggests that only between one fifth and one quarter of main food trips from Zone 23b residents are being retained in the local area and only one third of first choice top-up trips. The main beneficiary of main and top-up food shopping trips travelling outside of the local area remains Swindon.

5.77 Table 11d at Appendix II outlines the level of potential growth in retail expenditure which could be available to support net additional comparison goods floorspace in Royal Wootton Bassett over the period to 2035. Due to the low level of market share of the town for comparison goods shopping, a future constant market share would mean that there is limited capacity, with 64sq m net at 2025, 48q m net at 2030 and 73sq m net at 2036. The size of Royal Wootton Bassett and the strong influence of towns such as Swindon and Chippenham will mean that the ability to achieve significant qualitative improvements in terms of attracting some retailers will be limited.

Salisbury

5.78 Table 10a at Appendix II outlines the forecast quantitative capacity for convenience goods floorspace in Salisbury. It shows that there is capacity for net additional floorspace equivalent to £19.5m which, when an indicative sales density of £12,000/sq m is applied, is equivalent to 1,626sq m net at 2020. Based upon a

constant market share over the assessment period, and taking into account forecast changes in the level of market share for internet shopping, this capacity will fall to 870sq m net by 2025, 1,011sq m net at 2030 and 1,296sq m net at 2036. Therefore, short to longer term quantitative capacity (i.e. by 2025 and 2030) is equivalent to a modest sized foodstore, such as the scale of the ALDI and Lidl stores in the city.

5.79 In relation to the qualitative aspects of convenience goods floorspace provision in Salisbury, there is now a wide range of choice in the city. There are large grocery stores including Tesco, Sainsburys and Waitrose, and there have been recent additions of ALDI and Lidl stores. This is supplemented by a Marks and Spencer foodhall and an Iceland in the city centre. In addition to this overall choice, the results of the household survey indicate that retention of food shopping trips is high with around 80% main food trips from Zone 4 residents being retained and between 78%-94% of top-up food trips. Whilst retaining a higher proportion of trips would of course be advantageous in terms of sustainability, it will be noted that the majority of trips not being made by physical trips to stores are via the internet (with many of these purchases likely to have been fulfilled at supermarkets in the city itself). Within the wider catchment, there is some overlap in Salisbury's catchment with Andover and Southampton although the data presented in the available survey data suggests that it is not significant.

5.80 Overall, therefore, we do not consider there is any material qualitative deficiency in convenience goods shopping floorspace provision in Salisbury which would warrant a particular strategy for increasing provision in the city on an overall basis. However, the balance of floorspace provision and market between in-centre and out-of-centre stores is such that any opportunities to improve the quality of provision in the city centre should continue to be explored. For example, the redevelopment of the Sainsburys store at the Maltings has long been considered an opportunity for such an improvement and whilst it unlikely that there will be any particular desire by the operator to expand the amount of floorspace (in the short term at least), the provision of a modern replacement store will enable the city centre to retain both main and top-up food shopping trips.

5.81 Turning to comparison goods floorspace provision, Table 11a at Appendix II indicates that, based upon a constant market share over the assessment period, and also taking into account there will be net additional capacity for 2,459sq m net by 2025, falling to 1,670sq net by 2030 (as the effects of increased internet shopping are taken into account) and 2,502sq m by 2036. Given the nature of the forecasts, only the short term forecast (i.e. by 2025) should be given any significant weight.

5.82 In terms of qualitative aspects of provision for comparison goods, Salisbury city centre has the largest range and choice of provision of all the 'town centres' in Wiltshire with a higher than average proportion of comparison goods businesses. Whilst there has been a reduction in the number of retailers in recent years (2012-2020), there remains a wide choice of national multiple and local independents. Salisbury will of course continue to face competition from Southampton and, to a lesser extent, the coastal Dorset towns of Bournemouth and Poole, and this will limit the extent of any significant qualitative improvements in expanded choice (as a number of retailers will look towards the larger centres such as Southampton). That said, the strategy for the importance of Salisbury's comparison goods offer to South Wiltshire should remain of paramount importance and all opportunities to retain provision / make realistic improvements should continue to be explored. Also, whilst some out of centre comparison goods in the city does compete with the city centre, the range of provision does provide an important contribution to the overall offer in Salisbury, including the following retailers:

- B&Q, Southampton Road
- Bourne Retail Park – Dunelm and Wickes
- Bourne Way Retail Park – Carpetright and Dreams
- Churchill Way West – Waitrose, Smyths, Homesense and Sports Direct
- Matalan, Southampton Road
- South Retail Park – Home Bargains and Pets at Home
- Sports Direct – Summerlock Approach
- The Salisbury Retail Park – DFS, Oak Furniture Land, B&M, Harveys, The Range, Argos, Next, Currys/PC World

5.83 Overall, the range and choice of comparison goods provision across the city is considered to be good and, in light of the current state of the retail sector, the focus for the Local Plan Review strategy should be aiming to maintain the city's excellent market share across South Wiltshire in the face of competition from (A) internet shopping, and (B) surrounding large settlements such as Southampton.

Trowbridge

5.84 Our assessment of the quantitative requirement for convenience goods floorspace in Trowbridge is contained in Table 10d at Appendix II. It follows the same standard as the other assessments where it assesses the current and future quantitative capacity based upon a current market share approach over the assessment period (2020-2036). Table 10d shows that existing convenience goods stores in Trowbridge attract some £161.7m of convenience goods expenditure which is equivalent to a 4.9% market share across the study area. Table 5a at Appendix II indicates that £100.7m of expenditure draw to convenience stores in Trowbridge is drawn from Zone 17 (the zone in which the town sits), with circa £25m being drawn from Zone 18. Other expenditure is drawn from zones 15 (Devizes), 16 (Westbury) and 19 (Bradford-on-Avon).

5.85 Table 10d indicates that, making a small allowance for expenditure inflow, and the influence of internet shopping, the total turnover potential for stores in Trowbridge is £162.7m which can be compared with a benchmark turnover of £175.6m. This indicates that there is an over-supply at 2020 to the tune of -1,079sq m net sales area. On the basis of a constant market share and a growing level of available convenience goods expenditure this deficit will continue over the assessment period up to 2036.

5.86 Turning to qualitative issues, Trowbridge has three large supermarkets (ASDA, Sainsburys and Tesco Metro) which provide a wide range of convenience goods, particularly attracting main food shopping trips. These are supplemented a range of more modest sized foodstores including ALDI and Lidl stores on Bradley Road and Canal Road, along with a recently developed Marks & Spencer Foodhall at Cradle Bridge. These provide a wide range of choice and Trowbridge, unlike some of other the larger towns in Wiltshire, has a good quality of convenience goods stores in and around the town centre which contribute to its overall health. Therefore, coupled with the lack of quantitative capacity, we would recommend to the Council that there is no need to plan for net additional convenience goods floorspace in Trowbridge over the Local Plan Review period.

5.87 For the comparison goods floorspace provision, our quantitative assessment for Trowbridge is contained in Table 11c at Appendix II. The table indicates that stores in the town currently attract £230m of comparison goods expenditure from the study area and when a modest allowance is made for expenditure inflow (£6.3m),

along with then Table 11c indicates the total turnover potential of all comparison goods stores in Trowbridge to be circa £266m. This total study area derived turnover figure includes a town centre turnover figure of £127m, indicating that the town centre contributes 55% of all turnover in Trowbridge. As noted in the health check section of this report, the 2011 Study forecast that the comparison goods turnover of Trowbridge town centre was (when converted to 2018 prices) £142m. As a consequence, based upon the survey results, there has been a reduction in the comparison goods turnover of the town centre over the past decade. In contrast, the turnover of out of centre comparison goods stores has risen from £49.3m in 2010 to circa £120m in 2020.

5.88 Based upon a constant market share over the assessment period, and taking into account the forecast increasing influence of internet shopping, Table 11c indicates that there will be quantitative capacity for an additional 1,463sq m net by 2025 and 1,164sq m net by 2030.

5.89 In relation to the quality of existing comparison goods in Trowbridge, there is a diverse mix of local independent and national multiple retailers. The national multiples are generally housed in The Shires Shopping Centre and The Shires Gateway development (which was opened around a decade ago, around the same time as the preparation of the 2011 Study). Shires Gateway, which has been able to attract a number of new national multiple retailers to Trowbridge (or enhance their previous offer) is able to make a positive contribution to the quality of provision in the centre due to the short walking distance with other parts of the centre. Whilst not necessarily providing comparison goods floorspace, the St Stephens Place and Cradle Bridge developments are also very likely to make a positive contribution to the attractiveness of the comparison goods retail offer in the centre.

5.90 The scale, range and choice of comparison goods provision is reasonably substantial. The town centre, including Shires Gateway, has a gross floorspace for comparison goods retailers of circa 21,000sq m whilst comparison goods retailers located outside the centre have a total combined floorspace of around 18,000sq m (gross). Whilst it may be the case that there have not been any significant changes since the completion of the 2011 Study, the large growth in expenditure at out of centre floorspace, disproportionately so when compared with the town centre, is likely to be a sign as to the contribution it plays to the quality in the town centre as a whole.

5.91 In relation to shopping patterns, the household survey indicates a reasonably low retention rate amongst Zone 17 residents (the zone in which Trowbridge sits) although it also has a reason if compact catchment which includes Westbury, Devizes and Bradford-on-Avon. Leakage of trips, in addition to a large market share for internet shopping, to Bath is inevitable given the reasonably short journey time by train or car. Overall, we consider that Trowbridge has arguably reached close to the peak of the range of comparison goods provision that a town of this size and location is likely to achieve in the short to medium term. The focus will therefore be implementing a strategy which seeks to improve property and the wider range of land use provision in order to keep existing comparison goods retailers in the town.

Warminster

5.92 Table 10e at Appendix II provides our assessment of the quantitative capacity for convenience goods floorspace in Warminster. The indicates that stores currently attract £59m of convenience goods expenditure from the study area and Table 5a at Appendix II shows that £41m of this turnover derived from Zone 8. After making an allowance for a small amount of expenditure from outside of the study area Table 10e shows a

total turnover potential of £59.7m for the town. This can be compared with a benchmark turnover of existing facilities of £62.5m and a small over-provision of convenience goods floorspace at the base year of the assessment (2020).

5.93 Moving forwards on the basis of a constant market share over the assessment period, Table 10e indicates that the over-supply of floorspace will continue up to 2036. When making this assessment, it has been assumed that permanently resident army personnel in the Warminster area have been included in the population figures provided by Experian.

5.94 In addition to a handful of local independent food retails such as bakers, butchers and newsagents/convenience stores, all of the main supermarkets and foodstores are place in or around the town centre. As noted in our health check for Warminster in the previous section of this report, the location these stores provides a positive contribution to the health of the town centre. They also offer a good quality and choice of convenience good retail provision with the main food shopping offer of the Morrisons, Lidl and Waitrose stores (who also offer an important top-up food shopping role, no doubt due to their location) which is supplemented by the Iceland and other local independent stores. Retention of shopping trips in the town (via trips associated with Zone 8 residents) is reasonable but not outstanding, with two thirds of trips being retained, along with circa 8% and 5% of Zone 8 residents using on-line grocery deliveries for first and second choice main food shopping respectively. The main beneficiary of main food shopping trips 'leaking' outside of Zone 8 are stores in Frome (particularly the Sainsburys) and, to a lesser extent, stores in Westbury (most probably associated with residents living in the northern part of Zone 8). Overall, whilst it would be advantageous to increase the amount of retention of main and top-up food shopping trips in Zone 8 (via the provision of new floorspace) this must not be achieved at all costs. Warminster is in a unique position whereby all of the main convenience goods store are located in and around the town centre and any attempt to try and increase the retention rate of food shopping trips (and further increase choice (via a store outside of the town centre) may well become counter-productive as it could divert trade away from the town centre and thus damage its health. Therefore, if an opportunity in or around Warminster town centre can be found during the plan-making process then this should be explored.

5.95 Table 11h at Appendix II outlines the forecast level of quantitative capacity for comparison goods floorspace in Warminster going forwards. It indicates that the town as a whole attracts £59.4m of comparison goods expenditure from the study area, with the majority of spending coming from Zone 8 and small amounts coming from Zones 4, 5, 6 and 9. Based upon a small allowance for expenditure inflow, Table 11h indicates that there will be capacity for 310sq m net additional comparison goods floorspace by 2025 and 207sq m net in 2030.

5.96 For a town of its size we consider that Warminster has a reasonable range of comparison goods shops. Market Place has a varied mix of local independents and some national multiples which are housed in a mixture of generally pre-war buildings which will, no doubt, cause some issues for some comparison goods retailers. In addition to Market Place, these are Three Horseshoes Walk, the Cornmarket and a modern retail development, containing large units, on the north-eastern edge of the town centre. The latter has been able attract a number of national multiple retailers to the town including Argos, Carpetright, B&M and Poundstretcher (and these sit alongside the Lidl and Waitrose foodstores). Given the size of Warminster and its location in relation to surrounding towns it is inevitable that there will be a reasonable amount of leakage to surrounding settlements such as Frome, Trowbridge, Bath and Salisbury. Given the differing strengths of these surrounding towns, it is inevitable that leakage from the Warminster area will continue into the future and therefore we

consider the focus for any qualitative improvements should be on specific areas of the centre including Threehorseshoes Walk and ensuring good linkages between the modern retail units at the eastern end of the centre, Market Place and the large surface level car parks on the northern edge of the centre. This should include improvements to the appearance of Threehorseshoes Walk and, where necessary, reformatting units to meet modern requirements. In addition, the public realm around Central car park has the potential for significant improvement, as do linkages with the Waitrose and retail park to the east of the town centre.

Westbury

5.97 The final settlement subject to our assessment of need for convenience and comparison goods floorspace is Westbury. Table 10p provides our assessment of convenience goods floorspace capacity in the town and indicates that existing stores attract £46.9m of expenditure from the study area. This represents a study area market share of 1.4% with the majority of expenditure being drawn from Zone 16, plus smaller amounts coming from Zones 7, 8, 17 and 18. Taking into account a small allowance for expenditure inflow, Table 10p shows that the total turnover potential of convenience goods stores in Westbury is £47.2m which can be compared with the benchmark turnover of those stores of £42.2m. This suggests the potential to accommodate a small amount of net additional convenience goods floorspace, with a 'surplus' of £5.0m at 2020, falling to £3.1m at 2025 and £3.7m at 2030. This is equivalent to an indicative floorspace capacity of 420sq m net at 2020, 260sq m net at 2025 and 305sq m at 2030.

5.98 The key qualitative aspects of provision in Westbury's convenience goods sector are that: (A) Westbury lies between Trowbridge and Warminster and this would appear to limit the ability of the town to retain a large amount of main food shopping trips. Table 4 at Appendix [XX] indicates that Westbury, which lies in Zone 16 of the study area, retains around half of first choice main food shopping trips from Zone 16 residents. Westbury has better success at retaining second choice main food trips from Zone 16 residents, at 60%, the retention of top-up food shopping trips is at around 85%. (B) it is likely that one of the contributory factors to the low level of retention for main food shopping trips is the size of stores in Westbury. Whilst stores such as ALDI and Lidl are becoming popular, the survey evidence shows that larger supermarkets remain the most popular stores in Wiltshire's main towns. (C) whilst an increase to Westbury's convenience goods market share in order to retain more trips and shorten journey lengths is desirable, there is a need for some realism in light of the attractiveness of stores in Trowbridge and Warminster and the current state of the grocery sector where large new supermarkets are not being developed. In light of the above, it would appear that there should be a general desire to retain more food shopping trips in Westbury but the Local Plan Review will need to state that this will need to be in a measured and realistic way. For example, this may be through redevelopment / extension of existing stores in order to make them more efficient, with larger sales areas.

5.99 With regards to comparison goods floorspace quantitative capacity, Table 11k at Appendix II indicates that comparison goods stores in Westbury attract circa £11.6m of expenditure from study area residents. This is a low level of turnover when compared with other settlements of a similar size and the data contained within Table 7a indicates that Westbury only attracts comparison goods shopping trips from Zone 16 residents. Based upon a constant market share going forwards, Table 11k indicates that there will be capacity for an additional 65sq m net by 2025 and 47sq m by 2030. Such small levels of growth clearly indicate that there is no requirement actively plan for additional comparison goods floorspace and instead concentrate upon maintaining the market share of Westbury.

Qualitative Comparison Goods Floorspace Needs in the Local Service Centres

5.100 We have not undertaken separate assessments of the qualitative aspects of, or need for, comparison goods floorspace in the Local Service Centres of Cricklade, Downton, Market Lavington, Mere, Pewsey, Tisbury and Wilton as, whilst each of these centres will have their own characteristics, they generally provide a low level of comparison goods retail provision. Retailers which are present are generally small scale, local independents and are more than likely to have a niche offer. Given their size and location, these settlements will not realistically be able to support any meaningful level of additional comparison goods floorspace.

Summary of Quantitative Floorspace Capacity Forecasts

5.101 Whilst the overall assessment of need should be based upon both quantitative and qualitative factors, as set out in the preceding analysis, Tables 5.1 and 5.2 below summarise the results of our quantitative floorspace capacity forecasts for both convenience and comparison goods.

Table 5.1: summary of convenience goods floorspace quantitative need forecasts, 2020-2036

Town	2020 (sq m net)	2025 (sq m net)	2030 (sq m net)	2036 (sq m net)
Salisbury	1,626	870	1,011	1,296
Chippenham	1,888	1,254	1,451	1,805
Trowbridge	-1,079	-1,589	-1,423	-1,172
Royal Wootton Bassett	-906	-966	-950	-924
Calne	-350	-532	-477	-382
Amesbury	953	734	796	913
Melksham	192	-128	-42	101
Warminster	-234	-437	-398	-335
Bradford-on-Avon	-43	-141	-110	-75
Corsham	-216	-254	-244	-225
Devizes	1,762	1,494	1,541	1,647
Ludgershall	60	40	50	65
Malmesbury	-879	-965	-936	-880
Marlborough	-355	-481	-447	-398
Tidworth	-1,479	-1,543	-1,517	-1,474
Westbury	420	260	305	374

Table 5.2: summary of comparison goods floorspace quantitative need forecasts, 2025-2036

Town	2025 (sq m net)	2030 (sq m net)	2036 (sq m net)
Salisbury	2,459	1,670	2,502
Chippenham	1,632	1,306	2,043
Trowbridge	1,463	1,164	1,705
Royal Wootton Bassett	64	48	73
Calne	111	89	143
Amesbury	157	122	179
Melksham	362	278	408
Warminster	310	207	288
Bradford-on-Avon	89	78	105
Corsham	76	58	88
Devizes	341	220	346
Ludgershall	56	47	72
Malmesbury	112	92	144
Marlborough	220	164	223
Tidworth	52	45	72
Westbury	65	47	73

Assessment of Quantitative Capacity for Food and Beverage (Class A3/4/5) floorspace in the Main Settlements

5.102 Our assessment of quantitative capacity for food and beverage floorspace across the main settlements across Wiltshire follows a similar format as the quantitative capacity for Class A1 retail floorspace. In particular:

- The same study area is adopted as the retail assessment, as shown on the plan in Appendix I.
- The same population levels for each of the study area zones have also been adopted.
- Data on expenditure on cafes, restaurants, drinking establishments and take-away food[31] has been obtained from Experian for each of the study area zones. The base year for this expenditure data is 2017 and this has been projected forward across the assessment period using forecasts provided by Experian in their Retail Planner Briefing Note 18[32].
- Market share data informing the assessment has been taken from the household survey commissioned to inform this Study. In line with the survey data collected for the 2011 Study, the latest survey asked separate questions over the usage of food and beverage outlets during the daytime and during the evening. In order to model expenditure patterns and turnover levels we have assumed that 50% of available expenditure is directed to daytime visits and the other 50% directed to evening visits.
- Our analysis has allowed for existing floorspace to be allocated part of the available expenditure growth. This is commonly known as 'floorspace efficiency' although it can also be characterised in this instance as allowing part of the growth in expenditure to support existing floorspace.

[31] Eaten at home
[32] Published in October 2020

- In order to convert 'residual' or 'available' expenditure to support new food and beverage floorspace we have used a sales density of £3,500/sq m. This is based upon research undertaken by AY across the main national multiple food and beverage operators.
- For the purposes of assessing the capacity for net additional food and beverage floorspace, we have assumed that the balance between demand and supply of floorspace in each of the main settlements is in equilibrium and therefore population and expenditure growth will dictate the capacity for net additional floorspace into the future.

5.103 The results of our assessment in Appendix II are summarised in Table 5.3 below. For the avoidance of doubt the figures contained below are cumulative for the whole of the Local Plan Review period – i.e. the capacity of 2,837sq m for Chippenham is the whole of the identified capacity rather than just the net capacity between 2030 and 2036.

Table 5.3: quantitative capacity for food and beverage floorspace across the main settlements in Wiltshire

Settlement	2025 (sq m)	2030 (sq m)	2036 (sq m)
Amesbury	204	360	662
Bradford-on-Avon	215	398	704
Calne	130	256	490
Chippenham	790	1496	2837
Corsham	146	269	501
Devizes	240	441	856
Ludgershall	19	37	69
Malmesbury	188	339	637
Marlborough	304	561	1015
Melksham	208	384	704
Salisbury	1418	2568	4832
Tidworth	12	22	42
Trowbridge	787	1496	2758
Warminster	158	285	527
Westbury	47	92	175
Royal Wootton Bassett	130	245	457

5.104 The above figures show that, in line with the position in the settlement hierarchy, Trowbridge, Chippenham and Salisbury have by far the largest potential for net increases in food and beverage floorspace. The quantitative analysis confirms that Salisbury has a forecast food and beverage turnover of £158m in 2020, with Trowbridge attracting £82m and Chippenham attracting £83m. The gap between these three settlements and the fourth placed settlement is significant, with Marlborough attracting £32.5m of expenditure. The position of Marlborough is unsurprising given the higher-end nature of its offer coupled with the attractiveness of its town centre.

5.105 It should be noted, however, that these figures are based upon economic projections released before the advent of the COVID-19 outbreak; an outbreak which has the potential to affect expenditure at food and beverage establishments in a number of different ways:

- The current effect on the café, restaurant, bar and pub sectors has been significant with most commentators suggesting that these sectors are likely to be the ones which take longest to recover simply

due to the nature of how people use these businesses. At the time of finalising this Study, the UK had ended the first phase of 'lockdown' although a second period was underway in November 2020. However, even when 'lockdown' measures can be eased in the future, the likely need for continued social distancing measures in pubs, bars, cafés and restaurants in the short term may well affect the operation and efficiency of these businesses and annual turnover levels. The need to support existing businesses is a key reason why our quantitative assessment for food and beverage uses includes an allowance for part of the growth in food/beverage expenditure to be assigned to protect existing businesses.

- The implications of the current COVID-19 situation are such that some people will use town centres in different ways in the future and may be inclined to visit pubs, cafes, bars and restaurants less. This is likely to require monitoring by the Council over the next two years in order that the town centres strategy in the Local Plan can respond to any material shift in behaviour.
- One initial noticeable change which has emerged between March and May 2020 has been for 'traditional' sit-down cafes and restaurants to divert their attentions to home delivery and/or customer collection. This has, in part, been enabled by a temporary change in secondary legislation to allow cafes and restaurants who normally operate under Class A3/4 consents to move towards a more dominant Class A5 take-away role (in order to support the continued operation of the business). Should (A) this trend continue, and (B) central government extend the relaxation of the current land use class rules, then it is quite possible that there will be a forecast shift in per capita expenditure between the different food and beverage categories. Indeed, this may add to a trend which is already emerging whereby some high street businesses, such as estate agents and food/beverage delivery providers, have realised that they can operate their own business in same efficient (or perhaps even more efficient, and cost effective manner) via either home-working or use of commercial premises on industrial estates.

6. Site Assessments

Introduction

6.1 Parts (d), (e) and (f) of paragraph 85 of the current (February 2019) version of the NPPF note that planning policies should:

> "*(d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;*
>
> *e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and*
>
> *f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites*".

6.2 The previous section of this report has outlined the level of need for retail and leisure floorspace across all of the main settlements in Wiltshire. It indicates that there is not a significant level of quantitative and/or qualitative need for net additional floorspace across most settlements. However, this does not mean that sites and locations cannot be allocated, identified or promoted for main town centre uses as the identification of need should consider a wider set of issues associated with (A) town centre health, and (B) easy and convenient access to certain retail and service uses.

6.3 Moreover, the very recent changes to the use classes order in relation to retail and certain other main town centre uses will also have an influence on the assessment of potential future (re)development sites and how they may accommodate retail and main town centre uses.

6.4 The selection of sites and locations contained within this section of the Study have been provided by the Council and can be organised into two categories: (A) sites and premises in and around defined town centres; and (B) locations away from town centres which have the potential to provide small scale retail and service uses to serve local residential communities. It should also be noted that a number of towns across Wiltshire benefit from town centre masterplans/frameworks which also identify sites and locations for redevelopment and regeneration. A summary of these initiatives is recorded in our health check assessments and also within this chapter of the study.

Salisbury

6.5 Wiltshire Council published the Salisbury Central Area Framework ('CAF') in January 2020. It sets a framework for the future development of the city, across five key themes: (1) creating people-friendly streets; (2) improving open space and the environment; (3) creating vibrancy; (4) bringing out the qualities; and (5) identifying character areas and their role in the city. The CAF defines nine character area across the city within which a series of opportunities are identified. These are:

- Chequers:
  - Salt Lane car park – commercial and residential uses

  - Brown Street car park – commercial/leisure uses at ground floor with residential accommodation above.
  - Fisherton Street:
  - Investing in the public realm
- Centre:
  - High Street / Crane Street – redevelopment of existing large retail units into a series of smaller units.
  - BHF / Julia's House – refurbishment of existing buildings to provide retail and leisure uses.
- The Maltings and Cultural Quarter:
  - Masterplan for the redevelopment of this area to provide a mix of land uses (see below).
- The Meadows:
  - Improvements to access and connectively to the Meadows
- Churchfields:
  - Identification of the engine shed site for employment/rail-related uses
- Station:
  - Potential for relocation of rail depot, and opportunities for the provision of new office floorspace.
- Cathedral Close:
  - Public realm and connectivity improvements.
- Castle Street North:
  - Retention of existing Class B floorspace and promotion of city centre urban living.

6.6 The extensive work undertaken on the CAF indicates that the above opportunities should be the focus for meeting any identified needs for retail, leisure and main town centre uses. Therefore, our analysis has concentrated upon two key redevelopment opportunities: the Maltings/Central car park and Brown Streetcar park. It should also be noted that Salisbury has been short-listed for the Future High Streets Fund and the Council has recently approved a its detailed submission to the Fund which includes a number of projects including accessibility, urban living and improvements to the station area.

The Maltings and Central Car Park

6.7 The Maltings and Central car park area in the north-western part of Salisbury city centre has long been identified as a key redevelopment opportunity. It comprises a large area incorporating a Sainsburys supermarket, the Maltings shopping precinct, Salisbury City Hall, the Playhouse, a large surface level pay and display and areas on both sides of the River Avon. The extent of this area is shown in Figure 6.1 below.

Figure 6.1: plan of the Maltings and Central car park

6.8 Several years ago the site was earmarked for a retail-led redevelopment project although this did not materialise. The Council has now produced a Masterplan document which was approved by the Council as a material consideration in the determination of planning applications. The approved document takes a flexible approach to suitable land uses, including retail, leisure, food and beverage uses, offices, a hotel, theatre venues, a new library, tourism and health care uses. In terms of the various areas within the site, the approved document suggests the following:

- Active frontages towards the southern end of the site including more coherent routes and improved public realm areas.
- A cultural quarter within the south-western part of the site, including a potential new library, improvements to the built environment, public realm and improvements to the setting of listed buildings.
- Within the central part of the site a commercial and residential core area is proposed. This will replace the existing large surface area car parking and provide replacement multi-storey parking provision surrounded by a range of commercial, leisure and residential uses.
- A significant enhancement of the riverside area.

6.9 We consider that the evolution of the previous retail-led redevelopment project to a more balanced and varied mixed use project is the most sensible approach for this site.

6.10 The level of forecast need for retail and leisure floorspace is falling below previous assessments and the general direction of travel is for the future of the high street is for a wider mix of uses. Therefore, we consider that the

broader range of uses in the approved development principles is now more appropriate in terms of the contribution that they can make to the vitality and viability of the city centre.

6.11 Whilst the effects of the current COVID-19 pandemic are not yet fully known, we consider that a redevelopment scheme which focuses upon an appropriately sized replacement supermarket, residential, replacement car parking and other commercial uses is likely to be the most appropriate response for this site.

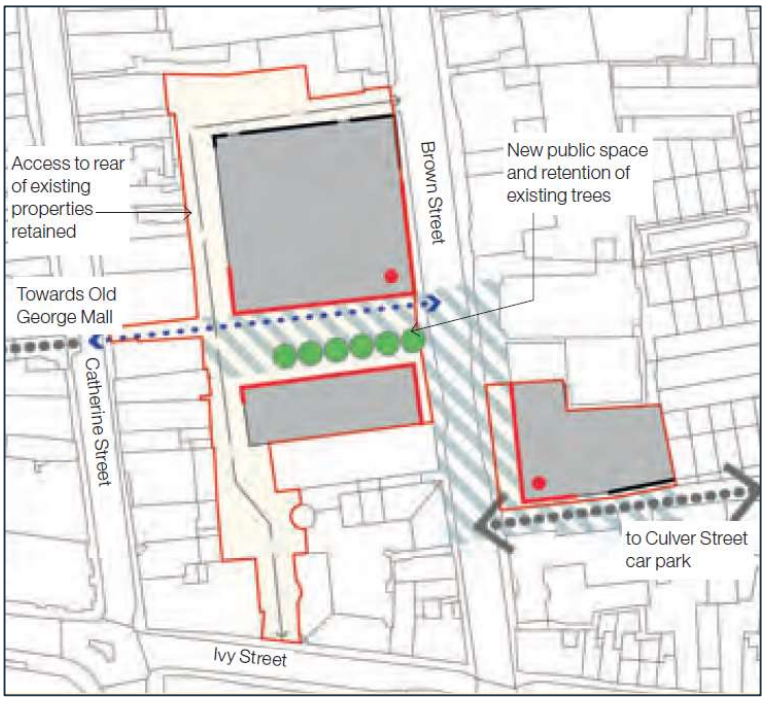
6.12 It will also be important for the Council to acknowledge that should it get applications in edge and out of centre locations for main town centre uses then the Maltings / Central car park site is a sequentially preferable option.

6.13 We are aware that the Council is continuing to consider the redevelopment options for this site (in light of the current economic situation) although the broad framework set out in June 2019 development principles document is, in our opinion, an appropriate guide as to how the redevelopment of this site can make a positive contribution to maintaining and enhancing the vitality and viability of Salisbury city centre.

Brown Street car park

6.14 This is an operational surface level pay and display car park which has previously been identified as a potential redevelopment site. It provides a modest amount of parking spaces but is one of the most centrally located parking areas in the central part of Salisbury. The extent of the car park is shown in Figure 6.2 below.

Figure 6.2: Brown Street car park[33]



6.15 This car park is identified in the CAF as a key redevelopment opportunity. It is identified as an opportunity for a substantial commercial/leisure component at ground floor and residential with policy-compliant levels of affordable housing. Given the site's location within the central area, in the short to medium term, the southern part could play a role in improving way-finding and pedestrian experience between Culver Street car park to

[33] Extract from Salisbury CAF, page 38

the east and the retail core to the west, with active frontages bringing vibrancy to this part of the central area. In the medium to long term, the remainder of the site could provide medium-sized non-residential units as business requirements and footfall patterns shift. As such, the site could be delivered in two or more phases as car parking and business requirements become clearer.

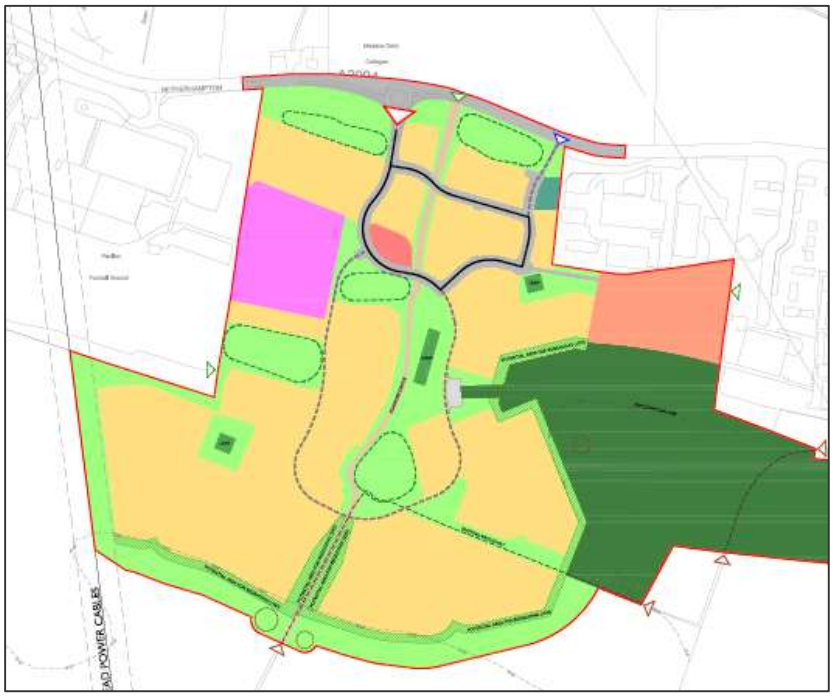
6.16 In addition to the city centre opportunities, there are opportunities for small-scale retail and main town centre use provision within large scale residential-led mixed use developments on the edge of the city. These are outlined below.

Netherhampton Road

6.17 This site lies to the south-west of the Salisbury urban area, on the western edge of West Harnham. It has outline planning permission for up to 640 dwellings, a mix of community uses and a local centre. Condition No.23 of the planning permission issued by the Council indicates that the local centre can include: (A) a convenience/food shop of up to 400sq m; (B) other A1-5 uses up to 600sq m; and (C) residential uses.

6.18 A copy of the approved parameters plan is shown in Figure 6.3 below[34].

Figure 6.3: Netherhampton Road



6.19 The retail floorspace permitted as part of this development has not been included as part of the schedule of commitments in our quantitative analysis although it will provide an important destination for some day to day retail and service use trips. The permission issued by the Council does not indicate whether the 400sq m of convenience goods is net or gross, although if it is net sales area then the approved floorspace will soak up one third of the forecast quantitative capacity. The centre may also be to accommodate a limited amount of comparison goods floorspace. Depending upon how it is planned in detail (at reserved matters stage) this

[34] The location of the proposed new local centre is shown as the red shaded area in the northern part of the proposed development.

has the potential to provide a defined local centre in the 'town centre hierarchy' serving the needs of this new development and also the adjacent area of Harnham.

Longhedge Local Centre, Old Sarum

6.20 In March 2019 the Council approved a detailed planning application for a new local centre (19/01690/FUL) at Longhedge, Old Sarum. The approved development includes a Class A1 retail convenience store, three other A1-5 / D1 units and a children's nursery. The decision notice issued by the Council controls the use of the permitted units, with the convenience store extending to circa 325sq m gross. The other three retail/service units extend to 93sq m gross apiece.

6.21 The convenience store within this new centre has been included as a commitment in the quantitative convenience expenditure capacity analysis for Salisbury and we consider that the overall content of the centre will make an important contribution to serving this expanding community on the northern edge of Salisbury.

Chippenham

6.22 Chippenham has a Central Area Masterplan which covers a large area to the north and south of the river and extending northwards to include Langley Park. The Masterplan sets out a strategic vision for the central area and provides guidance on several character areas:

- High Street – improved active frontage to the river and enhancements to town centre retail offer (including the Bath Road car park / Bridge Centre, see below).
- Cocklebury Area – improvements to rail station area, including new crossing and multi-storey car park, and new office development.
- Langley Park – new residential and employment development, along with leisure/hotel development in the south-western part of this area.
- Residential area – new residential along the river frontage.
- Riverfront area – enhancements to the public realm and river frontage.

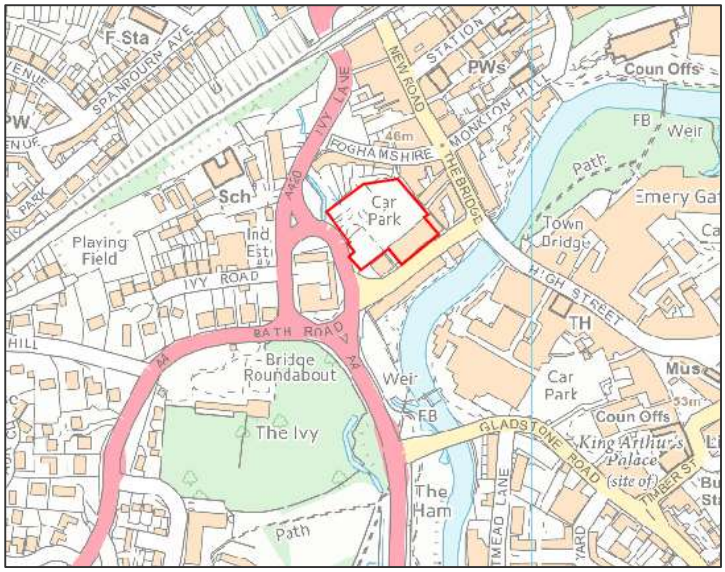
6.23 With regards to the Cocklebury area, there are the following proposals:

- Improvements to the capacity of the railway station, including a new booking hall, improvements to the public footbridge and public realm improvements.
- A new high-quality commercial building and a new decked car park at Sadlers Mead
- Wider transport improvements, including improved bus facilities, new cycle and pedestrian routes and capacity improvements around the railway station.

Bath Road car park

6.24 In a similar manner to the Maltings site in Salisbury, there has been a long-standing aspiration by Wiltshire Council (and the former North Wiltshire District Council) to redevelop the Bath Road car park and adjacent Bridge Centre site for main town centre uses. The extent of the car parking area is shown in Figure 6.4 below.

Figure 6.4: Bath Road car park, Chippenham



6.25 Several years ago this location was identified as a sequentially preferable location for a supermarket in Chippenham, although no formal proposals were ever submitted. Subsequently, the Council entered into an agreement with ING to investigate an alternative form of redevelopment proposal. This proposal was salient to the consideration of the sequential test in relation to out of centre retail proposals on Bath Road although the Council / ING project did not progress to any formal planning applications.

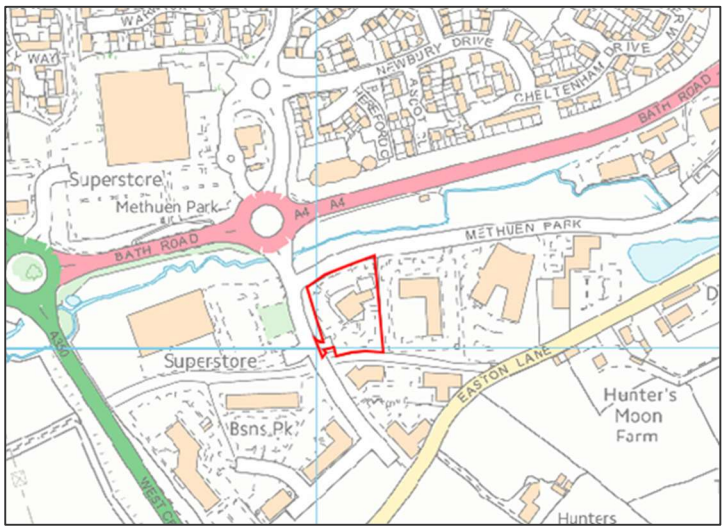
6.26 Whilst the Bath Road car park and the adjacent Bridge Centre site lie within Chippenham town centre, and they have previously considered (on two occasions) for retail-led development, we consider that they now are not appropriate locations for large scale retail floorspace. Any proposed redevelopment of the car park element will need to consider whether removal of parking capacity will have an harmful effect upon the attractiveness of the town centre (which clearly should be avoided) and should redevelopment become a possibility then a mix of small scale active commercial ground floor frontages on Bath Road along with residential, replacement parking and possibly some commercial accommodation are, in our opinion, likely to make the best positive contribution to the health and attractiveness of Chippenham town centre.

Additional Out-of-Centre Locations in Chippenham: The Mill House, Methuen Park & Magistrates Court sites

6.27 In addition to the sites/areas outlined in the Masterplan, two sites are currently subject to planning applications for foodstore development in Chippenham: The Mill House at Methuen Park and the former Magistrates Court site.

6.28 The Mill House is an out of centre site, the extent of the site is shown in Figure 6.5 below.

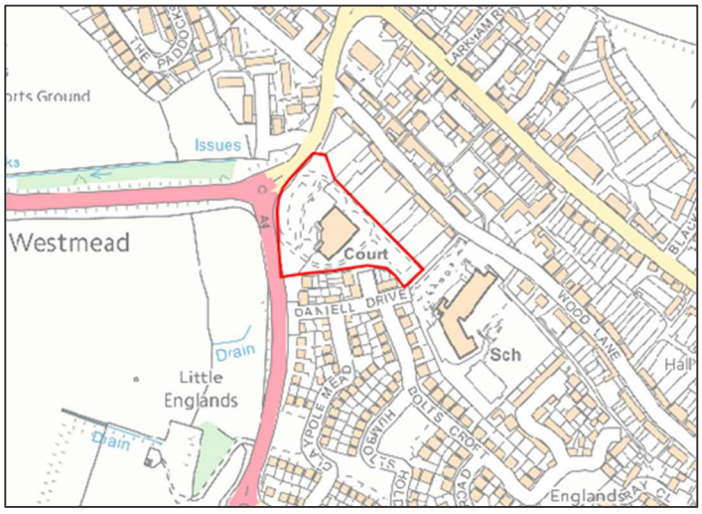
Figure 6.5: the Mill House, Methuen Park, Chippenham



6.29 The acceptability of a foodstore use on this site will depend upon whether there are any suitable and available sites or premises in sequentially preferable locations which can accommodate a similar type of proposal. As such, whilst it is open to the Council to grant planning permission for a retail use on this site, there is no overriding case for an allocation in the development plan bearing in mind the lack of any identified need.

6.30 Like the Mill House site, the former Magistrates Court site is currently subject to a planning application for a foodstore. It lies outside of the defined town centre and therefore retail proposals, from a development management perspective, will need to demonstrate compliance with the sequential and impact tests. The extent of the site is shown in Figure 6.6 below.

Figure 6.6: former Magistrates Court, Chippenham



6.31 The development management process will determine whether this is a sequentially preferable location to The Mill House, but based upon the findings of this Study there is not a strong case to recommend allocating this site for retail use in the new Local Plan.

Land at Chippenham Riverside (Rawlings Green)

6.32 The final site included in our assessment is the planned urban extension at Rawlings Green. This is a large area of land on the eastern edge of the Chippenham which is currently subject to an undetermined planning application for a residential-led mixed use development which includes a local centre focused upon Class A1, 2, 3, 4, B1, D1 and D2 land uses. The supporting information with the application does not specify an exact amount of floorspace for the proposed local centre although it is noted that the centre is intended to be small in scale.

6.33 This area of land is also allocated in the adopted Chippenham Site Allocations Plan for residential-led mixed use development although the allocation does not include provision for a local centre.

6.34 As noted by the development plan allocation, this area is reasonably close to Chippenham town centre and, whilst accessibility between the two locations needs to be improved, this would suggest that any retail / main town centre land use provision need only be very small in scale in order to not compete with the town centre, particularly as the town centre has a range of convenience goods stores.

6.35 We would therefore recommend that any planning permission granted for the Rawlings Green site has a restriction on the type and amount of retail and main town centre uses, which places a limit on the size of any convenience retail to a small foodstore, say 300-400sq m, and a similar amount of space for other retail and service uses.

Trowbridge

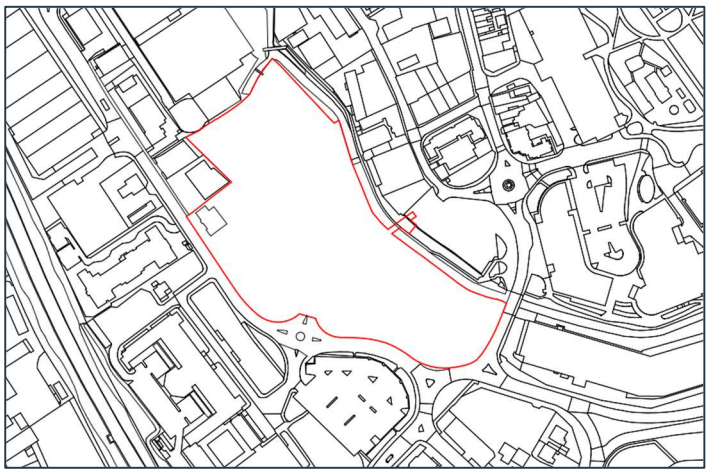
6.36 As noted earlier in this Study, Trowbridge town centre has been subject to a number of masterplanning exercises in recent years including the completion of a masterplan in 2014. There is also an on-going refresh of the masterplan to inform a forthcoming bid to the Future High Streets Fund. The Future High Streets Fund focuses on projects around movement/legibility at the town centre gateways, a resilient and diverse high street and an improved culture/leisure offer.

6.37 The 2014 masterplan identified a number of opportunity areas including the Riverway industrial site, The Shires/ASDA area, Court Street, East Wing, Castle Place and Cradle Bridge. The three key opportunity sites were identified as Cradle Bridge, Court Street car park and East Wing. The Cradle Bridge site has now been redeveloped for retail and leisure uses and therefore the Council has requested that our assessment concentrates upon the other large key opportunity site at East Wing.

East Wing Car Park

6.38 The East Wing car park (and surrounding area) lies in the south-western part of Trowbridge town centre. It currently accommodates a large surface car parking area and local authority uses. The extent of the site is shown in Figure 6.7 below.

Figure 6.7: East Wing, Trowbridge[35]



6.39 An outline planning application was submitted in 2017 for a mixed use redevelopment of the site to comprise 690sq m of retail floorspace, 1,100sq m of food and beverage floorspace, residential apartments, health uses and new leisure centre. The application has not been determined by the Council and we understand that the current proposal, as submitted, is unlikely to progress any further.

6.40 However, we consider that the suite of land uses proposed in the current planning application would provide a positive contribution to the health and attractiveness of Trowbridge town centre. As noted earlier in this report, Trowbridge town centre (and surrounding environs) has experienced considerable investment over the past decade and, as a consequence, the qualitative offer of the centre is considered to be good. The East Wing site is likely to be the final remaining major redevelopment site in Trowbridge town centre and we do not consider that there is a need for a significant amount of retail floorspace to be provided but community leisure uses would make an excellent addition to the 'offer' of the town centre.

Land south-east of Trowbridge

6.41 In addition to opportunities presented in and around the town centre, the planned housing in and around Trowbridge presents the opportunity for the provision of appropriately sized retail and service provision to serve the day to day needs of expanding local communities. One such location is land to the south east of Trowbridge.

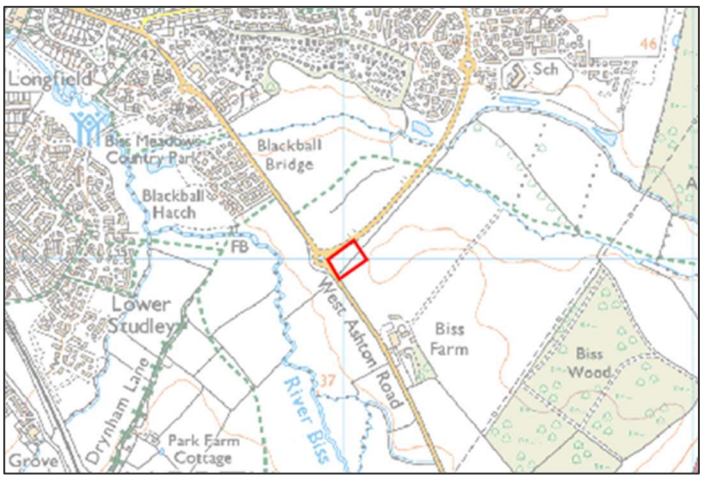
6.42 This area lies adjacent to West Ashton Road which is one of the vehicular routes into and out of Trowbridge from the south-east, and to the east of the main railway line through the town.

6.43 This area is subject to a residential led mixed use development for 2,500 dwellings and two local centres with an outline planning application which has a resolution to grant permission.

6.44 Within the submitted planning application the larger of the two proposed centres lies at the junction of West Ashton Road and Leap Gate, whilst the other (smaller centre) is proposed to the located to the west of West Ashton Road. This area is shown in Figure 6.8 below.

[35] Location plan taken from planning application 17/07693/OUT

Figure 6.8: proposed local centre at land south-east of Trowbridge



6.45 The Planning Statement submitted in support of this planning application indicates that the local centres will include:

- 1,100sq m of convenience goods floorspace;
- 350sq m of other Class A1-5 floorspace;
- An A4 public house;
- Residential accommodation; and
- Class D1 community uses.

6.46 This area of land falls within a strategic allocation in the adopted Core Strategy although there is no specific mention in the allocation for the provision of new local centres. That said, the location of the site and the scale of proposed development suggest that, in our opinion, the provision of local retail and service facilities are an appropriate element of the mixed use development.

6.47 In our opinion, in order to protect the health of Trowbridge town centre the 1,100sq m of convenience goods retail floorspace should be spread across both proposed local centres and should be restricted to modest sized convenience stores which concentrate upon top-up food shopping trips.

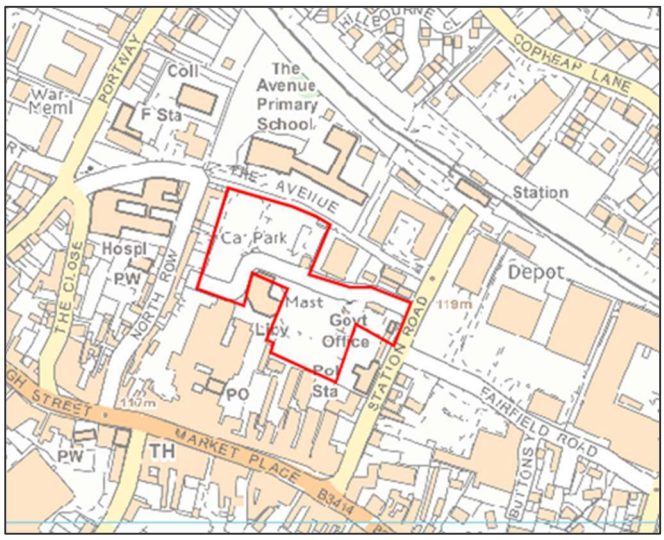
6.48 The level of other retail, service and leisure floorspace is considered to be reasonable for the proposed local centres although nevertheless needs to be controlled by condition within any future planning permission issued by the Council.

Warminster

Central Car Park

6.49 This is a surface level pay and display car park in the northern part of Warminster town centre located to the north of Market Place and between Station Road and North Row. The extent of the site is shown in Figure 6.9 below.

Figure 6.9: Central car park, Warminster



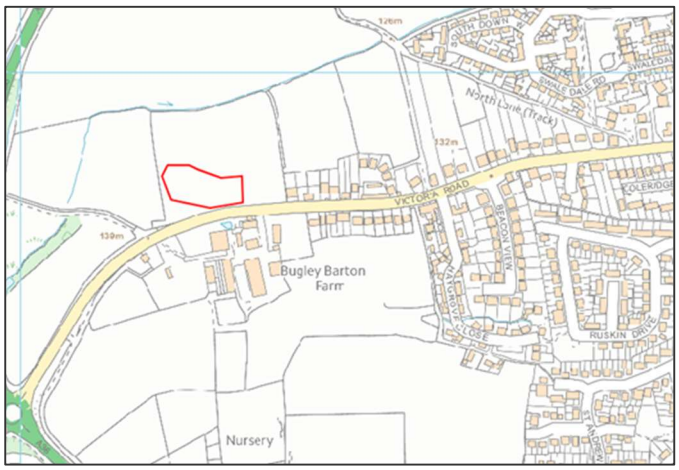
6.50 This area is a key element of the Warminster Neighbourhood Development Plan which indicates the potential options for the car park to be: possible new retail units, improvements to the public realm and re-organisation of existing parking arrangements, a new bus/coach interchange, relocation of the library and relocation of the weekly market.

6.51 In our view the content of the Neighbourhood Development Plan outlines an appropriate and logical approach to the future of this area. Whilst the assessment of retail need does not indicate a requirement for a significant level of new net additional retail floorspace in Warminster, provision of a modest amount of retail space within the re-organisation of this area would make a positive contribution to the health of the town centre. This is likely to focus upon linking the Cornmarket with Three Horseshoes Walk, whilst the remainder of the site should continue to make an important contribution to the town centre in terms of parking and general accessibility.

West Warminster

6.52 This is an area of land which is subject to a current planning application for a residential led mixed use development. The proposed development includes up to 1,000 new homes and, amongst other things, a new local centre. The site lies on the western edge of the Warminster urban area and the proposed development would extend the urban area up to the A36. The proposed local centre will be placed adjacent to Victoria Road and will extend to 0.56 hectares. The centre is proposed to contain a range of retail, service and main town centre uses, with the recommended conditions for the permission including provision for A1/3/4/5, C2/3 and D1 land uses. The location of the proposed local centre is shown in Figure 6.10 below.

Figure 6.10: West Warminster local centre



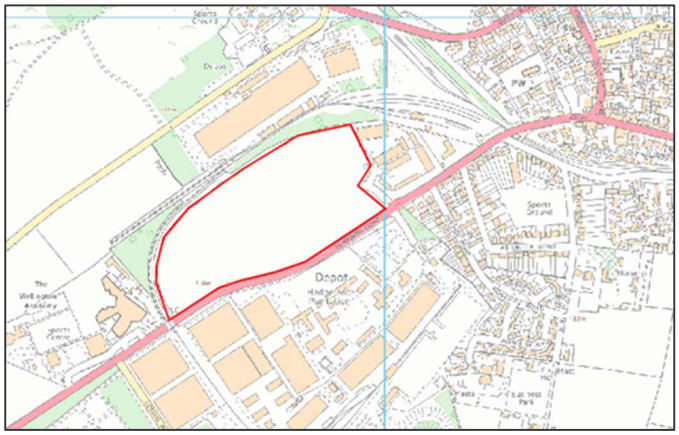
6.53 The recommended conditions do not include any cap on the provision of retail and main town centre use floorspace although we would recommend that a limit is placed on the overall amount of floorspace and also unit sizes in order to maintain this as a local centre which is complementary to the town centre.

Ludgershall

Castledown Business Park

6.54 This area of land is located to the west of the defined 'town centre' in Ludgershall and comprises a mainly vacant area of land which is earmarked for Class B employment uses in the development plan. The north-eastern part of the site includes a collection of small employment / commercial units, although no development has, so far, come forward on the remainder of the site. The extent of the site is shown in Figure 6.11 below.

Figure 6.11: Castledown Business Park, Ludgershall



6.55 This, in our opinion, should be classified as an out of centre site which does not have particularly good linkages with the defined 'town centre' in Ludgershall. As a consequence, we do not consider that this is a suitable location for a significant amount of retail and/or service uses although the site may offer the potential for new and complementary uses to those already present in the centre such as pub/restaurant and hotel uses. Such uses may also provide the opportunity to encourage the provision of employment/commercial uses across

the rest of the site and also provide an additional local resource for the large amount of new residential accommodation on the western side of Ludgershall.

Parnham Coaches, Andover Road, Ludgershall

6.56 This site lies on the northern edge of the central area of Ludgershall and comprises a collection of commercial buildings and hardstanding to the north of the Tesco Express convenience store on Andover Road. The extent of the site is show in Figure 6.12 below.

Figure 6.12: Parnham Coaches, Ludgershall

6.57 The site is currently subject to an application for redevelopment in order to provide 28 new residential dwellings with vehicular access from Andover Road. Whilst this site lies adjacent to the central retail area of Ludgershall it is not an ideal site in its own right for retail and/or leisure uses. The potential for such uses would be greatly improved if the adjacent Tesco Express store was included in any redevelopment scheme although the current proposal will provide an increased local residential population which can make a positive contribution to the vitality of Ludgershall.

Devizes

Devizes Wharf

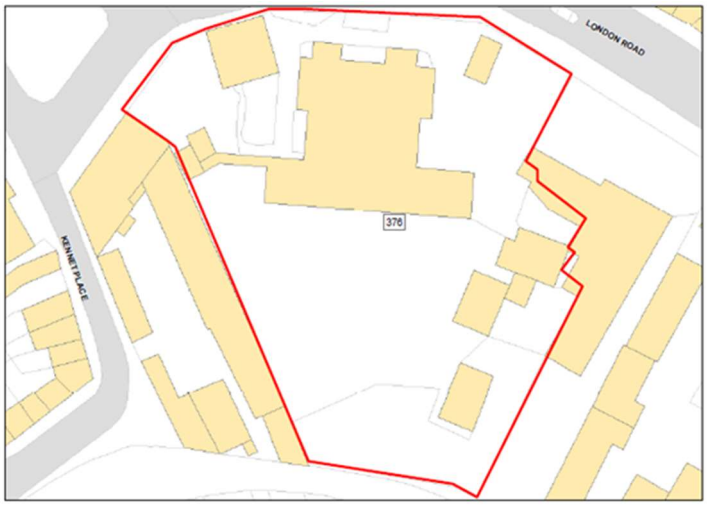
6.58 The Devizes Wharf area lies on the northern edge of the town centre and, as the name would suggest, lies adjacent to the Avon & Kennet Canal. This area includes offices, a surface level car parking area, retail floorspace and a museum. This area does not necessarily offer the potential for a large amount of net additional retail floorspace although redevelopment has the potential to provide a mix of land uses which makes more efficient use of this area and takes advantage of the waterfront location. Whilst Devizes has a good range of retail and service uses, any future redevelopment of this area offers the opportunity for the provision of food and beverage uses within active ground floor frontages with residential and/or workspace on the upper floors.

Marlborough

St Peters School

6.59 This site lies on the southern edge of Marlborough town centre and comprises a former school premises. It is surrounded by a mixture of retail and other commercial uses and is considered to be an edge of centre location (relative to the primary shopping area). The site is not allocated for redevelopment in the current development plan.

Figure 6.17: St Peters School, Marlborough



6.60 The site is currently subject to a planning application for the conversion of the existing building into a hotel use. As noted earlier in this Study, Marlborough has a good range of retail and service uses for a settlement of its size and therefore the provision of a new hotel use would add further variety to the land use offer in the centre and make a positive contribution to the health and attractiveness of the centre.

Melksham

Land to the North of the River Avon

6.61 As part of our site assessment analysis we have been asked to consider three locations to the north of the River Avon, to the north of the main town centre area in Melksham and either side of the A3102 bridge. These areas lie in edge / out of centre locations and comprise a mixture of employment, commercial and quasi-retail uses in an area of generally utilitarian buildings / plots.

Figure 6.19: Land to the North of the River Avon

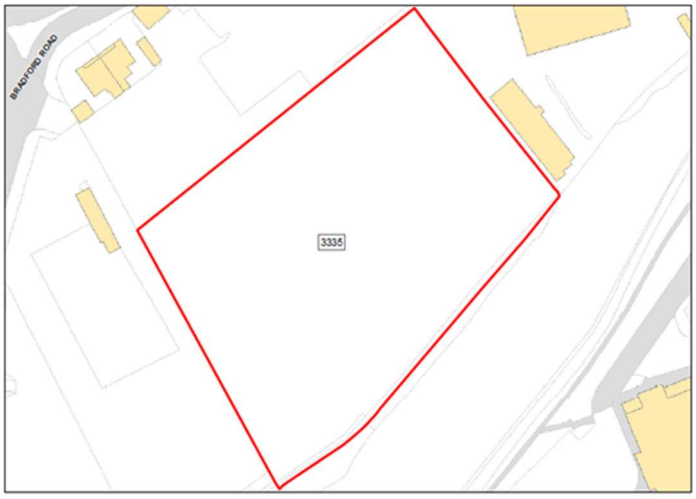


Figure 6.20: land to the north of the River Avon

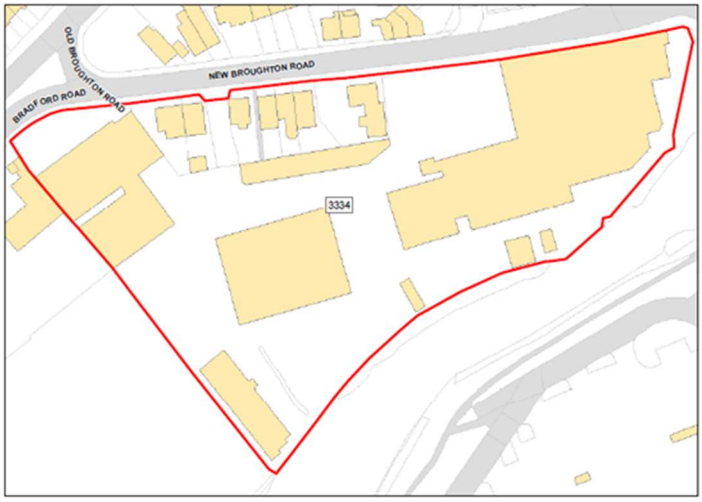
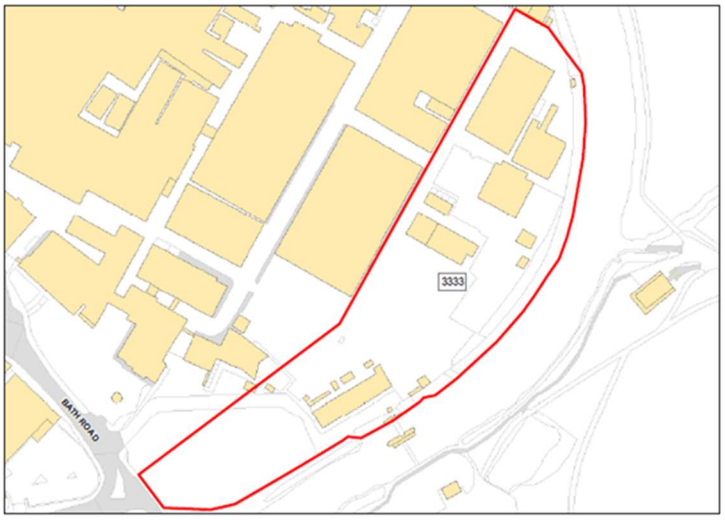


Figure 6.22: land to the north of the River Avon



6.62 Part of this area are identified as safeguarded employment land in the development plan and therefore redevelopment proposals for alternative uses will need to demonstrate that there is no detrimental/adverse impact upon the local employment land/premises supply. We do not consider that there is a need to identify this area for retail or large-scale commercial leisure uses and, instead, a redevelopment which brings new residential accommodation close to the town centre is likely to provide a positive contribution to town centre health.

6.63 It will also be important that redevelopment proposals make a positive contribution to this riverside location which is currently unattractive, and an enhancement can provide an attractive outlook for ground floor commercial uses, along with upper floor residential and workspace accommodation.

7. Policy Advice

Introduction

7.1 As part of the brief for this Study, the Council require advice on the content of retail and town centre use planning policies for the new Local Plan. This advice can be divided into three areas:

1. Advice on the overarching retail and town centres strategy for Wiltshire;
2. Advice on development management policies for proposals inside and outside of town centres; and
3. Advice on the threshold for the use of impact assessments for retail development proposals located outside of defined 'town centres'.

7.2 Our recommendations in relation to No.1 above are contained in the next section of this report when we summarise our conclusions regarding each of the main town centres in Wiltshire. However, it should be noted that where there is an identified need for net additional retail and/or leisure floorspace in a particular settlement, the identification of sites through either the development plan making or development management processes should follow the sequential approach to site selection. The only exception to this may be where there is a location-specific need such as a modest-sized local centre to serve a planned urban extension.

Retail and Town Centre Development Policies

7.3 The Council's brief for this Study requires an assessment of the different policy approaches and options for the new Local Plan and also to refresh and build upon the work undertaken in the 2015 Wiltshire Core Strategy Retail Review.

7.4 Section 4 of the 2015 Retail Review provided a detailed assessment of the content of development management policies for development proposals in primary and secondary shopping frontage areas, within defined 'town centres' and the approach to assessing proposals for retail and other main town centre uses located outside of defined centres. The advice in the 2015 Retail Review was provided in the context of the adopted Core Strategy (including Core Policy 38), the various 'saved' policies in the former District Local Plans and the 2012 version of the NPPF. That advice also explored the various options for development management policies for proposals inside and outside of defined 'town centres'.

7.5 The brief issued by the Council for this Study asks for a refresh of the 2015 recommendations and we have therefore taken into account any material changes in circumstances since the previous advice. This will include the publication of the new NPPF in 2019, the potential effects of changing town centre trends and the recent announcement of reform to part of the use classes order.

7.6 In relation to the new NPPF, one of the most notable changes in relation to town centre policy is the removal of the direct requirement to define primary and secondary frontages, with reference now only being made to town centre and primary shopping area boundaries. The updated version of the NPPG does still include reference to primary and secondary frontages although it gives local authorities discretion as to whether they need to define such frontages:

"Authorities may, where appropriate, also wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres".

7.7 In our view, the recent trends in town and city centres across the country have clearly prompted the changes in the latest version of the NPPF, with an acknowledgement that a wider range of uses can support the vitality and viability of town centres.

7.8 This trend has been intensified by the impact of the COVID-19 epidemic, which has the potential to affect a range of town centre uses, including retail, food/drink and leisure uses. For example, retail and leisure uses may not be able to operate at the same capacity as pre-COVID levels and this will affect turnovers and floorspace efficiency.

7.9 In light of these events, and whilst there is hope that the health of high streets will make a speedy recovery after the events in the first part of 2020, there is a need to rebalance the suite of land uses in town centres in order to ensure that a wider range of opportunities exist to visit, work and live in town centres.

7.10 The impact of the COVID-19 pandemic has intensified this direction of travel and has led, in July 2020, to the government introducing significant changes to the use classes order. These changes have been detailed in Section 2 of this report but, in summary, introduce an amalgamation of certain retail, service, leisure and office use classes into a single Class E. This will transform how the pattern of land uses in town centres are considered and managed, leading to the need to consider how local authorities will now need to formulate town centre and main town centre use development management policies.

7.11 Even before the outbreak of the COVID-19 pandemic in the UK, there has been an emerging trend away from the traditional primary and secondary retail frontage definitions. Even leaving aside the effects of COVID-19 and the government's most recent response, our advice to the Council would have been to delete these frontage definitions.

7.12 However, the forthcoming changes suggest:

- No control over straightforward changes of use within a certain use class, such as the new Use Class E.[36]
- Whilst frontage definitions may need to change but such changes cannot affect the principle of the permitted change of use
- In certain circumstances, it may be appropriate for development / redevelopment proposals to be potentially be controlled (by planning condition) regarding the range of retail and other main town centre uses
- There are other main town centre uses outside of Class E which will be required to be assessed in terms of the suitability for certain town centre locations

7.13 In light of these various events, it is our recommendation that:

- As the Council moves onward with the preparation of the Local Plan Review, new policies are brought forward to replace the various saved town centre development management policies.

[36] Unless there are specific restrictions already in place

- We recommend that there is no requirement for the retention of primary and secondary retail frontages in light of (A) the changing approach at the national planning policy level; and (B) the changing nature of the retail sector and town centre environments.
- For the present time, and based upon current national planning policy, there should be defined primary shopping area and town centre boundaries in the main town centres across Wiltshire. Given the on-going changes in national policy and secondary legislation, there will be a need to keep the wording of the accompanying development management policy under review as the preparation of the Local Plan Review progresses.
- Depending upon how the strategic retail / town centre policy is ultimately formulated, consideration should be given to whether there should be an additional criterion which allows reference to retail impact / town centre health issues identified in Neighbourhood Plans when reaching an overall conclusion on the impact of retail and leisure proposals.

7.14 In light of the above, we propose a single strategic town centre development policy which acknowledges the changing policy and legislative landscape. The recommended policy:

- Gives in principle support for the suite of land uses which are covered by the new Class E of the use classes order.
- Ensures that where physical development works are required to accompany either a change of use (permitted development or otherwise), or a redevelopment proposal, they meet certain criteria to protect the character and appearance of a town centre.
- Within town centre boundaries preference given for other main town centre uses not covered by Class E subject to compliance with a set of assessment criteria.

7.15 Whilst at the present time national policy requires Local Plans to define primary shopping areas and town centre boundaries, we can see some potential inconsistencies between the definition of primary shopping areas in the NPPF (2019) and the rationale behind the new Class E. Therefore, this aspect should be kept under review as the preparation of the Local Plan Review progresses.

7.16 In relation to proposals outside of defined 'town centres', we have re-visited the recommendations of the 2015 Retail Review[37] and consider that they remain appropriate and in line with current national planning policy apart from the need to remove the reference to offices from the impact assessment test. We continue to recommend that the supporting text to this edge/out of centre policy includes the recommendations set out in the 2015 Retail Review in order that (A) potential applicants for this type of proposal are fully informed as to the requirements of the Council for planning applications and also how the Council will approach the assessment of their planning applications.

[37] See paragraphs 4.48 to 4.76 of the 2015 Retail Review

Retail Impact Assessment Threshold

7.17 The current threshold for the use of the impact assessment in Core Policy 38 of the Core Strategy for retail and leisure development located outside of defined 'town centres' is 200sq m gross. This was a recommendation of the 2011 Study and was accepted as part of the Examination of the Core Strategy document. The 2015 Retail Review did not provide any further advice on the impact threshold.

7.18 The NPPG was published after the completion of the 2011 Study and provides updated guidance on how local authorities should approach the setting of local impact assessment thresholds. The latest guidance indicates that any local threshold should be set with consideration to the following factors:

- the scale of proposals relative to town centres
- the existing viability and vitality of town centres
- cumulative effects of recent developments
- whether local town centres are vulnerable
- likely effects of development on any town centre strategy
- impact on any other planned investment

7.19 In relation to the scale of proposals relative to 'town centres', the size of town centres across Wiltshire's 'town centre' hierarchy varies quite considerably.

7.20 Salisbury city centre has around 50,000sq m of Class A1 retail floorspace and therefore the default national threshold is circa 5% of the total floorspace. In contrast, Corsham town centre has around 5,000sq m of Class A1 floorspace which is around half of the national default threshold. It should also be noted that most of the main town centres are materially smaller than Salisbury city centre (and the other two large centres, Chippenham and Trowbridge).

7.21 Therefore, in 'scale' terms this would suggest that a low threshold should be set as it should relate to the 'lowest common denominator' – i.e. the smaller town centres – particularly where a proposal may have a catchment which extends beyond a single settlement.

7.22 We also consider that other factors should be considered, including the type of retail provision and how modern out-of-centre retail developments across the UK compare to retail units in town centres.

7.23 In relation to convenience retail provision, there are a wide range of store sizes across the main settlements, from large supermarkets, through to medium sized stores and convenience stores which are below 1,000sq m gross. Indeed, a number of convenience stores in the smaller centres do not extend beyond 500sq m gross and some provide an anchor role for their centre.

7.24 Therefore, we consider that a threshold of 200sq m gross for retail proposals involving the potential sale of convenience goods should be retained for all centres in Wiltshire.

7.25 This should apply to new stand-alone retail floorspace, proposed extensions to existing stores and applications to vary the range of goods to be sold from existing floorspace.

7.26 Turning to comparison goods retailing a similar exercise has been undertaken. This has found a wide variety of unit sizes, varying from smaller units in general in the smaller centres with a larger average size of unit in the three larger centres in Salisbury, Trowbridge and Chippenham.

7.27 Across many of the small to medium sized centres in Wiltshire there is not a large amount of out of centre retail floorspace, with the only settlements providing such floorspace being Trowbridge, Chippenham and Salisbury.

7.28 In our experience whilst out of centre retail park units have traditionally been around circa 1,000sq m, some of these units have become increasing smaller in recent years, particularly for non-bulky comparison goods retailers. For example, units at 500-600sq m are common in some retail parks.

7.29 Within Wiltshire's town centres, unit sizes can vary quite significantly. For many of the small to medium sized town centres units generally do not exceed 500sq m. Larger units exist in the three larger centres (Salisbury, Trowbridge and Chippenham) although they are generally in the minority.

7.30 Generally speaking, single comparison goods retailers do not provide a lone sole anchor to defined centres, although the range and quality of comparison goods retailers provides a very important contribution to its health and attractiveness. With such a range of retailers present in Wiltshire's town centres it is difficult to be precise over the exact scale of floorspace which could have a detrimental impact upon the health of defined centres. However, given trends in the retail sector in recent years and the evolution of the retail warehousing sector, we consider that floorspace of trigger of 200sq m gross remains appropriate for impact assessments for comparison goods floorspace.

7.31 This should apply to new stand-alone retail floorspace, proposed extensions to existing stores and applications to vary the range of goods to be sold from existing floorspace. In addition, this threshold should apply to bulky and non-bulky goods proposals and, like convenience goods uses, be applied consistently across the whole of Wiltshire for both edge of centre and out of centre locations.

7.32 The need for this low level of floorspace is also reinforced by factors such as cumulative impact issues, the health of town centres and the development plan strategy.

7.33 In relation to cumulative impact, whilst it might be that the individual impacts associated with a circa 200sq m retail proposal do not cause any particular cause for concern, the combined effects of this proposal plus others starts to become significant. Therefore, the Council must consider how the cumulative build-up of a certain scale of development could affect the health of town centres. In other words, if it is considered that the individual impacts of say a 200sq m retail proposal are unlikely to ever be significant then this would allow all future 200sq m proposals to avoid the assessment of cumulative impact. Should half a dozen or so of these come forward then this would equate to circa 1,200sq m – 1,500sq m of new retail floorspace which would have avoided any consideration of impact despite it being over the national impact threshold.

7.34 A particularly problematical area for this scenario could be retail parks, either existing or committed, where they comprise several units collectively could be over 2,500sq m but individual each unit is, say, between 500-1,000sq. Should a series of separate applications be submitted, with the red line area around just one unit, then the impact test would be avoided.

7.35 As noted above, the health of a centre may not rely on just one retailer but when the cumulative build-up comprises a range of retailers selling different types of goods then the longer term effects on the health of a centre could become an issue. This would be reinforced whether there is potential for store relocations.

7.36 In relation to the consideration of the impact test at the local level and how the impact policy in the new Local Plan should be framed, we consider that the following factors are important:

- The test of impact will apply to all convenience and comparison goods proposals outside of the boundaries of defined 'town centres' in Wiltshire. This will include proposals for new retail units, extensions to exist floorspace and proposals to vary the terms of planning conditions and legal agreements in relation to the range of goods to be sold.
- It will be important for the Council and applicants to agree the scope of any impact assessment before applications are submitted. This will include: the characteristics of the proposed development (including the various scenarios for its retail offer), the catchment area of the proposal, the 'town centres' whose health could be affected by the proposal (including an assessment of their health), the pattern of trade draw and trade diversion to the proposal and any restrictions which applicants are willing to accept on the proposed retail floorspace.
- It will also be necessary to agree the committed retail development which should be included in the cumulative assessment of retail impact.
- The list of alternative locations which should be included in the sequential test, including an agreement over the approach to flexibility in terms of scale and format.

New Local Centres

7.37 Finally, the creation of new communities across Wiltshire, primarily in the form of large scale urban extensions, are likely to require the provision of a proportionate amount of new retail and service uses in order to provide day-to-day facilities for these growing communities. A number of existing permissions allow for new local / neighbourhood centres which have been deemed necessary and appropriate by the Council when granting planning permission.

7.38 In our view, appropriately sized new centres are important for the overall provision of retail and service uses as they will provide easily accessible facilities for new and expanded communities although they need to be controlled in order that they serve local needs and not affect the health and attractiveness of higher order centres. They must also be placed in an appropriate location to serve these new communities and not be attractive to a wider catchment.

7.39 We set out below (not in any order of importance or preference) a basket of factors which we feel may be appropriate for the Council to take into account when considering the amount and location of expanded retail and service provision to serve new residential neighbourhoods:

- The size of the new community which the new local/neighbourhood centre should serve. The number of new homes/residents within a new community will provide an important guide as to the scale and function

of any new centre, which can be calculated the level of expenditure capacity arising from the size of the new community.

- Geographic distribution of retail floorspace and main town centre uses. The size of a new local or neighbourhood centre in a new community will also be influenced by the proximity to existing retail provision. For example, if an existing town, local or district centre lies nearby then there may not be a need to plan for a further new centre.
- Walk-in catchments and public transport accessibility. It will be important when planning for the provision of new centres that they are easily accessible by public accessible and on foot.

8. Summary and Conclusions

Introduction

8.1 This Wiltshire Retail and Town Centres Study report has been prepared by Avison Young for Wiltshire Council and is intended to form part of the evidence base library for the Wiltshire Local Plan Review. This Study provides the following information and analysis:

- A review of town centre health, including how employment, residential and education uses may have a role to play in town centres, alongside an assessment of town centre health over time.
- An analysis of retail, leisure and town centre trends.
- An assessment of the need for retail and leisure floorspace over the next 5, 10 and 15 years in relation to qualitative and quantitative indicators.
- An assessment of sites and premises to accommodate any identified needs.
- A review of primary shopping area and town centre boundaries.
- An assessment of policy options for town centre strategies and development management policies for the new Local Plan, including the role of district/local centres and the threshold for impact assessments for retail/leisure development.

8.2 We outline below our findings and recommendations for each of the main settlements in Wiltshire, followed by our recommendations for planning policy / planning strategy for the Local Plan Review.

8.3 It should be noted that the preparation of this Study commenced at the start of 2020 before the severe impact of the COVID-19 pandemic on the UK economy took hold and how the population went about their working and day-to-day lives. We can confirm that almost all of the evidence base data for the Study was collected before the government introduced lockdown measures, although the economic forecasts adopted for our quantitative assessment are dated October 2020.

8.4 As a consequence, the factual content of this Study should be read and understood in this context. Moreover, as will be discussed further in this report, the impact of the COVID-19 pandemic is, based upon current predictions, likely to have long-lasting effects on the UK economy and how people interact with retail, leisure and wider town centre uses. Therefore, the content of this Study should be seen as a baseline for the evidence base library for the Local Plan Review and there will be a need for the Council to consider updates to the health checks, economic forecasts and shopping patterns.

The Towns

Amesbury

8.5 Amesbury is considered to be a healthy town centre which has adapted to a changing retail landscape in recent years. Following the opening of the out of centre Tesco supermarket and also new retail provision at Solstice Park (Home Bargains), the convenience goods sector in the town centre has not experienced any material decline and ALDI have decided to invest in the centre by occupying the former Co-op foodstore. Vacancies have also fallen and, whilst the centre has a limited catchment, it is able to complement nearby

Salisbury in relation to serving the local communities of South Wiltshire. Whilst there is forecast to be a modest amount of quantitative capacity for net additional convenience and comparison goods floorspace, the amount of capacity is modest and therefore do not warrant any specific allocations in the new Local Plan.

Bradford-on-Avon

8.6 Bradford on Avon is considered to be a healthy town centre which co-exists alongside nearby centres such as Trowbridge and Bath and has, over many years, found its own niche serving both the day to day needs of the local community and also a wider shopping catchment which is attracted to its niche comparison goods / service offer. Whilst the proportion of vacant retail units in the centre should be kept under close observation, the centre benefits from the very attractive built environment and river-side setting, which is a key attractor to the centre. There is no identified capacity / need for net additional retail floorspace for the town in the new Local Plan.

Calne

8.7 Calne is considered to be a town centre with a localised retail function whose catchment is influenced by the nearby higher order centre of Chippenham. Over recent years vacancies in the centre have been a concern, being above the national average, and although they have been falling albeit the closure of the Co-op store is a blow to the level of choice in the centre for convenience goods.

8.8 It is not possible to say whether the recently developed out of centre Tesco store is the primary cause of the closure of the town centre Co-op although the evidence suggests that there has been a material shift in main and top-up food shopping trips away from the town centre alongside the benefit of Tesco in clawing back trips which were being lost to Chippenham.

8.9 There is no requirement to plan for net additional retail floorspace in Calne over the new Local Plan period.

Chippenham

8.10 Chippenham remains a healthy town centre, which has been able to adapt to the on-going trends facing the UK retail sector and also the significant changes in out of centre floorspace in the town.

8.11 The town centre has seen falling vacant retail units alongside changes to the comparison goods and service sectors, which have mirrored the national trend. Given the growing amount of foodstore floorspace outside of the town centre, the centre will increasingly concentrate upon top-up food shopping trips and there is a need to ensure that the High Street and the two purpose built shopping areas (Emery Gate and Borough Parade) continue to underpin the health of the centre.

8.12 In relation to the need for convenience goods floorspace, our assessment has found that there is modest capacity for net additional floorspace. It remains the case that the quality of the convenience retail offer in the town centre has the potential for improvement and it is likely that should the Council permit either or both of the current ALDI and Lidl foodstore applications then the available quantitative capacity will be eliminated.

8.13 For comparison goods floorspace in Chippenham, we do not consider that there is a requirement to plan for net additional floorspace over the plan period. The town has seen considerable change and growth in out of centre retail floorspace over the past decade and whilst this does not appear to have fundamentally

affected the health of the town centre in the short term, we consider that the overall retail offer of the town is sufficient not to plan for any net additional floorspace.

8.14 In terms of new town centre redevelopment opportunities, the Bath Road car park and adjacent Bridge Centre site remain the most obvious opportunity to introduce new land uses into the town centre. This area has long been discussed and assessed in terms of the ability to provide new retail and leisure floorspace although various proposals over the past dozen or so years have not come to fruition which are in part, in our opinion, due to the ability to provide out of centre comparison goods retail units. This area should, in our opinion, remain an identified opportunity although any redevelopment potential will be dependent on: (A) the effect upon car parking capacity in Chippenham town centre; (B) a wider range of land uses being considered (moving away from a retail-led redevelopment in favour of a more balanced mixed use scheme involving residential uses).

Corsham

8.15 Corsham is one of the smaller main town centres in Wiltshire and performs a localised retail and service function. The convenience goods offer of the centre has remained constant over the past several years, continuing to focus upon primarily a top-up food shopping role, with main food shopping trips by local residents primarily flowing to nearby Chippenham. Based upon a constant market share over the new Local Plan period, there is no quantitative requirement for net additional convenience goods floorspace in the town and the level of potential comparison goods floorspace is so modest that no plan allocations are required.

Devizes

8.16 Devizes is considered to be a healthy town centre with a limited but strong localised catchment area. The centre is able to attract a large majority of main and top-up food shopping trips from residents of the town centre and the surrounding area, along with a reasonable amount of food shopping trips from Pewsey. The town centre also has a strong market penetration rate for a settlement of its size and the overall quality of the built environment no doubt adds to the overall attractiveness of the town centre. In relation to quantitative retail expenditure factors, Devizes has the highest level of expenditure capacity for net additional convenience goods floorspace. We do not consider that there is a strong requirement to allocate sites in the new Local Plan for such new floorspace, although there is no reason why an appropriate proposal could not be approved via the development management process so long as it meets the sequential and impact tests.

Malmesbury

8.17 Malmesbury is considered to be a healthy town centre which benefits from a small but strong localised catchment, assisted by the attractiveness of the centre for visitors from outside of the local area.

8.18 Over the past several years vacancies in the centre have fallen which is an encouraging sign of the level of business demand for premises in the centre. Since the opening of the Waitrose store to the east of the town centre the number of convenience goods retailers does not appear to have been negatively affected and the trend in comparison goods retailers and service has generally followed the national average. With a strong local socio-economic profile and attractive town centre we can conclude that Malmesbury is a vital and viable town centre.

Marlborough

8.19 Marlborough is considered to be a very healthy town centre, with a low (and falling) vacancy rate which is a sign of the popularity of the town as retail and service destination and as a location where commercial businesses feel confident to trade.

8.20 For a town of the size of Marlborough, its town centre has a significant amount of retail floorspace and a wide selection of retailers and service uses. In our view, the centre has a higher proportion and range of comparison goods than would be expected for a town of this size including a reasonably high number of comparison goods retailers. There is, in our opinion, no requirement for the new Local Plan to allocate sites / premises for net additional retail floorspace in Marlborough.

Melksham

8.21 Melksham has a limited shopping catchment due to its location close proximity and relationship to Chippenham and Trowbridge, particularly in relation to comparison goods shopping. The town is, however, able to retain a large majority of main and top-up food shopping trips with the town centre Sainsburys supermarket achieving the largest market share of main food shopping trips. In recent years the town centre has followed the national trend in terms of falling comparison goods retailers and an increasing amount of service uses. Vacancies have fallen slightly since the 2012 Study and remain below the national average. Our assessment of 'need' indicates that there is not a strong requirement to plan for any new convenience or comparison goods floorspace in the town and the qualitative aspects of provision are considered to be reasonably good bearing in mind the other settlements in the local catchment. The main area for potential improvement lies on the northern edge of the town centre, to the north of the river, either side of the A3102 bridge, where residential-led mixed use development has the potential to make a positive contribution to the health and attractiveness of the town centre.

Royal Wootton Bassett

8.22 Royal Wootton Bassett is considered to be reasonably healthy town centre with vacancies falling and the trend in the proportion of different types of retail and service uses following the national average. Shopping patterns associated with the town will always be influenced by larger retail destinations such as Swindon and, to a lesser extent, Chippenham.

8.23 The 2020 household survey results reveal a much lower market share for the Sainsburys store in the town centre, leading to a materially lower turnover for this store. The difference will of course be explained, in part, by trade diversion to the new ALDI store although it may be necessary to gather further evidence base information to assist in the determination of future retail development proposals.

8.24 The new household survey also shows a continued large level of leakage primarily to Swindon which is inevitable given the amount of retail floorspace in that settlement which will continue to constrain the amount of retail floorspace which can be provided and sustained in Royal Wootton Bassett.

8.25 Our assessment of need indicates that, with the introduction of the new out of centre ALDI foodstore there is not any forecast quantitative capacity for additional floorspace. In relation to qualitative matters associated with convenience good floorspace provision, the introduction of the ALDI store has made a material

improvement, albeit in an out of centre location, although the latest shopping patterns evidence base data indicates a continued significant leakage of trips to nearby Swindon. On face value, this would suggest the potential for additional provision in order to reduce some of this leakage although care needs to be taken in order to ensure that the health of the town centre is protected. In relation comparison goods shopping provision, the ability of Royal Wootton to make any meaningful additions will be constrained by the influence of the higher order centres of Swindon and Chippenham, and we conclude that there is limited opportunity for additional comparison goods floorspace.

Salisbury

8.26 Salisbury city centre is the largest 'town centre' in Wiltshire and is considered to be a healthy and attractive centre. It is a popular centre for both non-food and food shopping, particularly the former, with a wide catchment area across southern Wiltshire. In line with most market towns, the past several years have seen a shift between the balance of comparison goods and service uses, with the former falling and service uses increasing. However, the strength and attractiveness of the city centre means that the proportion of comparison goods retailers remains above its respective national average. The performance of the city centre is also, no doubt, helped by the presence of the cathedral and the general attractiveness of the built environment.

8.27 In relation to the need for retail floorspace, our assessment has found that there is not any overriding qualitative need to plan for new convenience although there is a modest amount of quantitative retail expenditure capacity for net additional floorspace. We consider that the focus for any improvements to the quality of convenience goods floorspace in Salisbury will be on the city centre and it remains the case that the Maltings / Central Car Park site offers the best opportunity to maintain and enhance the health and attractiveness of the city centre. It should also be noted that modest sized local centres in proposed/planned urban extensions will also be able to soak up the identified quantitative and (location specific) qualitative needs.

Tidworth and Ludgershall

8.28 Ludgershall is, in our opinion, very much focused around a day-to-day top-up food shopping and service role. It performs this role well and compliments the larger main food shopping role of nearby Tidworth. It has experienced a large amount of new residential development in recent years, particularly associated with armed forces accommodation. There is planning permission for a considerable amount of additional residential accommodation which will help to support existing floorspace.

8.29 Tidworth provides a significant amount of retail floorspace which effectively serves both settlements, particularly for convenience goods floorspace. Apart from the two large foodstores, Tidworth is a small centre with a localised function although the catchment of the foodstores is much wider for both main and top-up food shopping trips. These stores are likely to benefit the remainder of the centre via linked trips.

8.30 Given the size and function of Tidworth and Ludgershall, along with the scale of existing floorspace, there is no identified need for net additional retail floorspace.

Trowbridge

8.31 Trowbridge remains one of the most popular retail destinations in Wiltshire with a reasonable market share across a broad range of comparison goods categories. The Gateway development on the western side of the town centre has helped to provide modern retail floorspace in addition to the Shires Shopping Centre, whilst the centre also benefits from a large ASDA supermarket which attracts main food shopping trips.

8.32 Since the 2012 Study, the St Stephen's Place has contributed a significant amount of new leisure floorspace to the town centre, including a new cinema and food/beverage provision. The town now retains a large majority of cinema-going trips and has a strong leisure catchment which encompasses the surrounding (smaller) towns such as Bradford-on-Avon, Melksham and Devizes.

8.33 The addition of further retail and leisure uses at Cradle Bridge (including a Marks & Spencer store) has also arguably provided a further positive impact upon the health and attractiveness of the town centre. These new developments have meant that Trowbridge has been the main focus for town centre development projects over the past several years and it is now likely, in our opinion, that the centre has reached its peak potential in terms of retail and leisure floorspace. The focus should now be placed upon retaining existing businesses and also diversifying under-used and vacant space, not least as the proportion of vacant units in the centre has remained well above the national average over the past several years.

8.34 There is not an identified need for net additional retail and leisure floorspace in the town centre although it is our recommendation that local-specific needs can be supported in relation to modest sized local/neighbourhood centres in planned urban extensions.

Warminster

8.35 Warminster is considered to be a relatively healthy town centre, with the proportions of retail and service uses in the centre consistently in line with their respective national averages over the past several years, which is also the case for the proportion of vacancies. Vacancies occur in all centres although it should be noted that Warminster has a higher than usual number in its core retail area. However, one of the particular advantages for Warminster town centre is the presence of all of the town's main foodstores in and around the centre. This helps to drive footfall and is a particular positive benefit to the centre.

8.36 The overall quality and choice of provision in and around the town centre is considered to be good and our assessment is that there is no requirement for the Council to plan for new net additional retail and leisure floorspace in the town in the new Local Plan.

8.37 The large surface level car parking area in the northern part of the town centre has been identified in the Neighbourhood Plan particular for transport-related improvements and we consider that this is the most appropriate approach bearing in mind the lack of identified need for net additional retail floorspace.

Westbury

8.38 Westbury town centre is considered to have a modest level of health but would appear to face a number of challenges. Vacancies in the centre have not fallen in recent years and the proportion of vacancies in the centre is now above the national average and now comprise around one third of all surveyed units.

8.39 Westbury's catchment is limited by the reasonably close proximity of Warminster, Frome and Trowbridge which has materially larger retail offers. The town loses a substantial amount of food and non-food shopping trips to each of these three towns and, based upon a constant market share going forwards, there is no requirement to identify sites for net additional retail floorspace.

Food and Beverage Land Uses

8.40 In addition to the assessments of need for retail floorspace, an assessment has also been undertaken for food and beverage floorspace. From a quantitative perspective, this shows the theoretical potential to increase provision across the main town centres in Wiltshire although the wider implications of the COVID-19 outbreak mean that:

- The current effect on the café, restaurant, bar and pub sectors has been significant with most commentators suggesting that these sectors are likely to be the ones which take longest to recover simply due to the nature of how people use these businesses. With social distancing measure likely to be in place for some time, even when pub, bar, café and restaurant uses re-open, the operation and efficiency of these businesses is likely to be materially affected which could affect annual turnover levels.
- The implications of the current COVID-19 situation are such that some people will use town centres in different ways in the future and may be inclined to visit pubs, cafes, bars and restaurants less. This is likely to require monitoring by the Council over the next two years in order that the town centres strategy in the Local Plan can respond to any material shift in behaviour.
- One initial noticeable change which has emerged during 2020 has been for 'traditional' sit-down cafes and restaurants to divert their attentions to home delivery and/or customer collection. This has, in part, been enabled by a temporary change in secondary legislation to allow cafes and restaurants who normally operate under Class A3/4 consents to move towards a more dominant Class A5 take-away role (in order to support the continued operation of the business). Should (A) this trend continue, and (B) central government extend the relaxation of the current land use class rules, then it is quite possible that there will be a forecast shift in per capita expenditure between the different food and beverage categories.

Policy Recommendations

8.41 With regards to other elements of planning policy / strategy for the new Local Plan, this Study has re-visited the recommendations of the 2015 Retail Review in relation to development management policies for proposals inside and outside of defined 'town centres' across Wiltshire.

8.42 With regards to development management policies associated with proposals outside of defined 'town centres', we do not consider that the recommendations of the 2015 Retail Review need to be amended in any material way, as they remain consistent with the contents of the current version of the NPPF. The only suggested change is to remove the requirement to assess the likely impact of office proposals, with the test now concentrating upon retail and leisure uses. We also consider that the impact assessment threshold of 200sq m remains appropriate for retail and leisure proposals outside of defined 'town centres'.

8.43 With regards to areas within defined 'town centres', national planning policy has been refined since the adoption of the Core Strategy and the 2015 Retail Review. The formal requirement to define primary and secondary frontages has been removed, and whilst the NPPG still gives the option to define such frontages, we consider that they should be replaced with a single development management policy relating to defined primary shopping areas and wider town centre boundaries. This policy should continue to prioritise Class A1 retail uses in primary shopping areas although in line with the current trends across the high street the new policy for both primary shopping areas and wider town centre areas should promote a flexible approach to other land uses where they can maintain and enhance vitality and viability.

8.44 This trend has been intensified by the impact of the COVID-19 epidemic, which has the potential to affect a range of town centre uses, including retail, food/drink and leisure uses. For example, retail and leisure uses may not be able to operate at the same capacity as pre-COVID levels and this will affect turnovers and floorspace efficiency. In light of these events, and whilst there is hope that the health of high streets will make a speedy recovery after the events in the first part of 2020, there is a need to rebalance the suite of land uses in town centres in order to ensure that a wider range of opportunities exist to visit, work and live in town centres.

8.45 The impact of the COVID-19 pandemic has intensified this direction of travel and has led, in July 2020, to the government introducing significant changes to the use classes order. These changes have been detailed in Section 2 of this report but, in summary, introduce an amalgamation of certain retail, service, leisure and office use classes into a single Class E. This will transform how the pattern of land uses in town centres are considered and managed, leading to the need to consider how local authorities will now need to formulate town centre and main town centre use development management policies.

8.46 Even before the outbreak of the COVID-19 pandemic in the UK, there has been an emerging trend away from the traditional primary and secondary retail frontage definitions. Even leaving aside the effects of COVID-19 and the government's most recent response, our advice to the Council would have been to delete these frontage definitions.

8.47 However, the forthcoming changes suggest:

- No control over straightforward changes of use
- Frontages may need to change but cannot affect the principle of the permitted change of use
- Development / redevelopment could potentially be controlled regarding the range of retail and other main town centre uses
- There are other main town centre uses outside of Class E which will be required to be assessed in terms of the suitability for certain town centre locations

8.48 In light of these various events, it is our recommendation that:

- As the Council moves onward with the preparation of the Local Plan Review, new policies are brought forward to replace the various saved town centre development management policies.

- We recommend that there is no requirement for the retention of primary and secondary retail frontages in light of (A) the changing approach at the national planning policy level; and (B) the changing nature of the retail sector and town centre environments.
- For the present time, and based upon current national planning policy, there should be defined primary shopping area and town centre boundaries in the main town centres across Wiltshire. Given the on-going changes in national policy and secondary legislation, there will be a need to keep the wording of the accompanying development management policy under review as the preparation of the Local Plan Review progresses.
- Depending upon how the strategic retail / town centre policy is ultimately formulated, consideration should be given to whether there should be an additional criterion which allows reference to retail impact / town centre health issues identified in Neighbourhood Plans when reaching an overall conclusion on the impact of retail and leisure proposals.

8.49 In light of the above, we propose a single strategic town centre development policy which acknowledges the changing policy and legislative landscape. The recommended policy:

- Gives in principle support for the suite of land uses which are covered by the new Class E of the use classes order.
- Ensures that where physical development works are required to accompany either a change of use (permitted development or otherwise), or a redevelopment proposal, they meet certain criteria to protect the character and appearance of a town centre.
- Within town centre boundaries preference given for other main town centre uses not covered by Class E subject to compliance with a set of assessment criteria.

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