

North Somerset Council
Local Development Framework

Core Strategy

Topic Paper
Retail Hierarchy & Provision

RETAIL HIERARCHY & PROVISION

This is part of a series of topic papers summarising the evidence base for the North Somerset Core Strategy document.

Other topic papers available in this series:

- Demography, health, social inclusion and deprivation
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- Economy
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- Sustainable construction / design quality including heritage
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1. INTRODUCTION

The purpose of this Topic Paper is to set out existing evidence and identify gaps in evidence with regard to the current retail distribution across the district. This is in order to establish a hierarchy and network of retail centres and identify the future role of each centre (whether it should expand or reduce in size). This will aid more detailed Local Development Documents to identify sites within or adjacent existing centres where future retail provision should be located. The Topic Paper also summarises how existing policies have informed the designation of retail centres in the North Somerset Replacement Local Plan and how these policies should be taken forward in the Core Strategy.

2. CURRENT POLICY BACKGROUND

PPS 12 requires the Core Strategy to set out a locational development strategy which identifies areas suitable for major growth, taking into account the aim to develop more sustainable forms of urban and rural development. The adopted regional planning guidance for the South West is currently RPG 10. However this is under review with the Draft RSS at the examination in public stage. The weight attached to this strategy therefore will increase during the preparation of the Core Strategy as the Panel report and then proposed changes are published.

2.1 National

PPS 6 Planning for Town Centres requires Local Authorities to classify existing retail provision into city, town, district and local centres (see appendix) and to set out a spatial vision and strategy for the network and hierarchy of those centres setting out how the role of different centres will contribute to the overall spatial vision for their area, whether there is a need to rebalance the network of centres and how best to distribute any identified growth and achieve a more even distribution of town centre uses so that people's everyday needs are met at the local level.

Any change in the role and function of centres should come through the development plan process rather than through planning applications.

PPS6 has put a heavy emphasis on safeguarding the vitality and viability of existing town centres by avoiding the development of out-of-centre or out-of-town, car-based, retail park developments.

2.2 Regional

RPG10

This provides the current strategic planning guidance for the South West Region. It sets out a clear urban focus for larger retailing facilities and requires retail developments to be in keeping with the size and function of settlements (particularly with market towns); to avoid new regional shopping centres, but to achieve a distribution of convenience shopping in any settlement of a reasonable size to have access to all normal day-to-day necessities and reduce/minimise the lengths and frequency of trips for day-to-day shopping.

The Draft Regional Spatial Strategy

The emerging Regional Spatial Strategy has identified Weston-super-Mare as a strategically significant town (SSCT) which should be the focus of significant new development and change to foster regeneration, particularly the regeneration of the town centre. (Policy A and sub-regional policies)

Other towns should be assessed by the Local Authority as to whether they qualify as Market Towns (settlement B status) in which case they could accommodate locally significant development with the aim of increasing self-containment, develop their function as service centres especially in terms of employment and service accessibility and secure targeted development which could address regeneration needs.(Policy B)

In other small towns and villages (settlement C status) only small-scale development will be appropriate if it extends the range of services available, helps to support key services and does not significantly increase traffic on local roads.

Beyond that, (and contrary to advice contained in PPS6), the Draft RSS has not assessed in broad terms the overall need for new retail or where it should go. It also failed to develop a strategic framework for the development of a network of centres stating which centres should grow or decline to avoid over-concentration of growth in higher order centres.

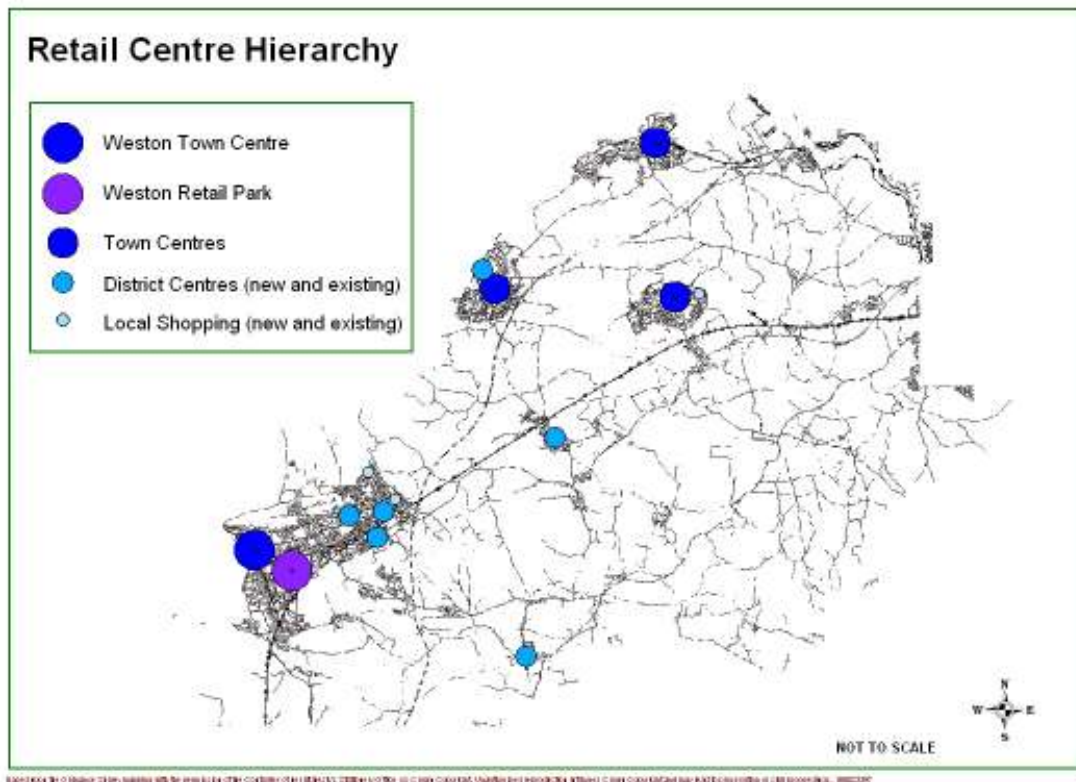
2.3 Local

North Somerset Replacement Local Plan

Existing Centres

The adopted Replacement Local Plan has identified 4 town centres in the main settlements, 1 retail park in Weston-super-Mare, 5 existing district centres, (2 in rural centres (Yatton and Winscombe), 2 in the eastern part of Weston-super-Mare and 1 in Clevedon) plus 1 existing local centre in Nailsea (see map below).

Policy RT/1 allows new town centre uses in these centres, if they reflect the scale and role of the centre, are consistent with the sequential approach and promote the vitality and viability of the centre. Policy RT/1 and RT/6 aim to steer new town centre uses towards these identified centres and resist out-of-centre retail development.



Expanding Centres

The Replacement Local Plan has identified a need to extend the existing town centre of Portishead and the existing District centre of Queensway, Worle and has allocated sites to meet that identified need (Policy RT/3).

New Centres

Policy RT/4 has also allocated a site for a new district centre at Locking Castle 'to support a broader range of facilities for the expanding population of the adjacent area' and has allocated sites for the provision of two new local centres at Ebdon Grounds and St Georges also in the eastern part of Weston-super-Mare 'to meet the requirements of nearby expanding residential developments'.

The policies in the Replacement Local Plan were not informed by the North Somerset Retail and Leisure Study.

The Weston Area Action Plan (WAAP) – Preferred Option Report

Existing Centres

The WAAP recognises that there is need for further retail floorspace in the town centre of Weston-super-Mare, but suggests no sites for allocation.

New Centres

The WAAP has developed 4 options dealing with the sequence of new development in the 'Greater Weston area' and specifically refers to the need for two new 'neighbourhood centres' at the Airfield and RAF Locking to serve anticipated new population in these areas. The term has been specifically chosen to avoid any classification into district and local centre and leave that distinction to the Core Strategy.

3. EXISTING EVIDENCE BASE & KEY FACTS

The existing main evidence can be divided into two main sources:

- The North Somerset Retail and Leisure Study completed 2006
- Monitoring Data collected annually

3.1 The North Somerset Retail and Leisure Study

The Study was produced by Donaldson in 2006 to inform the WAAP. It included a detailed town centre health check for Weston-super-Mare and the assessment of future floor-space projections using the RECAP model for Weston-super Mare central, the Retail Park and the other three town centres. No reference or assessment was made about the role and function of existing or emerging district and local centres and no healthcheck has been performed for the 3 smaller town centres of Clevedon, Nailsea and Portishead.

Comparing Weston-super-Mare as a whole to neighbouring strategically significant cities and towns (as identified in draft RSS) it can be seen in the table below that Weston-super-Mare is slightly underperforming compared to other towns with a similar population size and appears to be more at a level with Yeovil. However, Taunton and Yeovil both have large catchments areas and are situated further away from the higher order centres such as Bristol, Bath and Exeter to feel their competitive impact. The exception in the retail hierarchy is Bath (in very close proximity to Bristol), which appears to be due to its special historic setting and the large number of visitors who contribute towards its performance. Gloucester is also underperforming in its group, but has strong competition from Cheltenham in close proximity.

Town	Zone A/ sq.m. rental values June 2005	Shopping Centre Yields*	Population
Bath	£2,583	5%	50.000-100.000
Exeter	£2,045	5.5%	100.000-200.000
Bristol City Centre	£1,991	5%	200.000 +
Taunton	£1,453	5.25%	50.000 – 100.000
Gloucester	£1,399	7%	100.000 – 200.000
Weston-super-Mare	£969	7%	50.000 – 100.000
Yeovil	£915	6.25%	Less than 50.000
Bridgwater	£484	7%	Less than 50.000

* Shopping centre yields - expectations of rental growth and future economic prospects, the lower the figure, the better the prospects

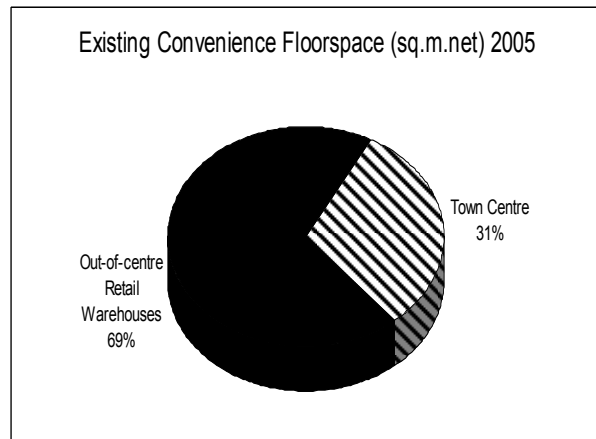
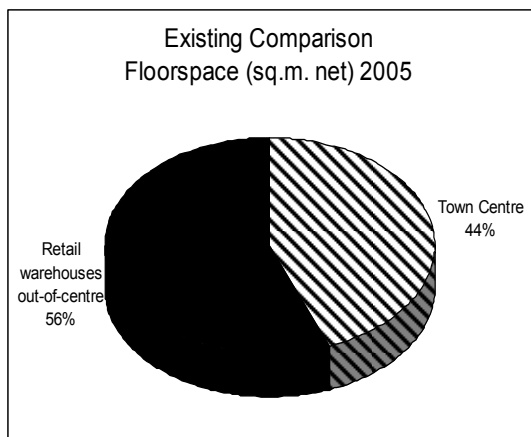
Weston-super-Mare Retail

With regard to retail, the existing food stores in the town centre overtrade somewhat compared to the estimated company averages. Donaldson's have allowed these sales to fall to the level based on estimated 2002/3 company averages, which is apparently 'a conventional approach in retail studies of this type.' (Donaldson themselves are aware of the limitations of this approach – Para 6.50). Based on this assumption, the study forecasts that there will be a substantial convenience (food) floorspace need of 3100m² by 2011 and 8150m² by 2021. This is sufficient to support one full-sized food superstore in the town by 2011 and potentially a 2nd

superstore by 2021. It is recommended that this need should be met in the town centre or on an edge-of-centre site in a combination of discount supermarkets, town centre format supermarkets and extensions to existing food stores in the town centre or if that is not possible Donaldson recommend that the need could be met in a new district centre anchored by a food store.

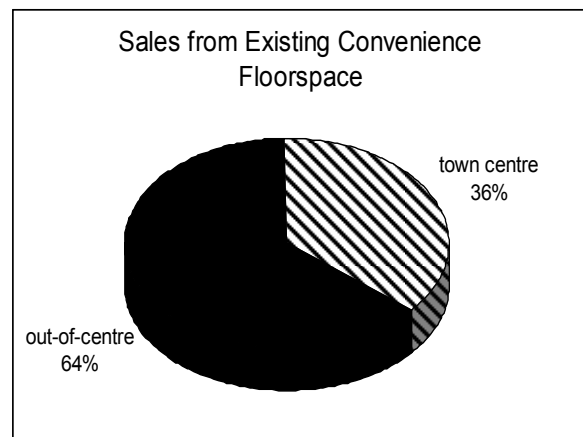
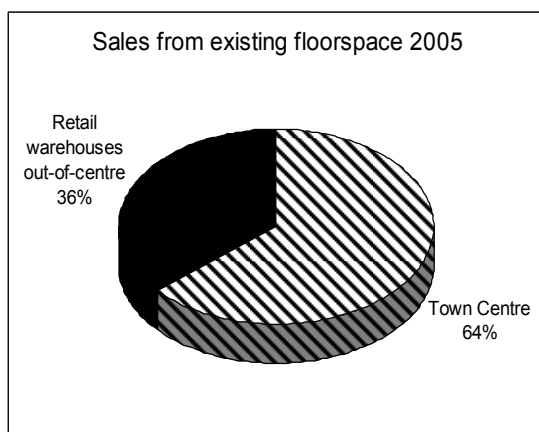
With regard to comparison shopping the anticipated need in Weston (Town centre and out-of-centre) by 2021 is estimated to be around 68,100 m² much of which should be located in town centre or edge-of-centre sites.

Looking at the relationship between the Town centre and the out-of-centre retail floorspace, the following can be found:



Only 44% of comparison goods floor-space in Weston-super-Mare is located in the Town Centre, with regard to food stores (convenience goods), it is even less – 31%.

With regard to sales, the picture is a little more encouraging for comparison goods with 64% of all sales in the town centre, but only 36% of all food sales (convenience goods) are in the town centre.



Leisure & Office uses have also been assessed in the study but do not form part of this retail paper.

Demand for Restaurants, Bars and Take Aways (A3/A4/A5) uses

The study has identified a total floorspace requirement for the above uses of 1,585 sq.m. minimum to 2,230 sq.m. maximum by operators such as Ask Central, Caffe Nero, Dominos Pizza, Whitbread etc.

Existing Town Centres in Clevedon, Nailsea and Portishead

The findings were that the three other town centres (Portishead, Clevedon and Nailsea) capture a 'typical' market share of expenditure for their size and are predicted to have no capacity for convenience floorspace until 2021. With regard to comparison goods floorspace, Clevedon is forecast to have a need of about 6000 m² by 2021, which could be achieved through small scale infill development, changes of use and extensions to existing buildings. It is not considered sufficient to allocate sites for any substantial comparison goods development. Portishead is forecast to have even less need of 3150 m² by 2021 which could be achieved in the same way as Clevedon. Only Nailsea has a forecast capacity of around 9000m² by 2021 which could potentially take the form of an extension to the town centre or the methods mentioned above.

Hence, based on the above assumptions, the centres would remain constant and there would be no need to allocate new sites, apart from Nailsea. It is important to bear in mind that 10 year forecasting capacity figures have to be treated with extreme caution. In addition, no health check of the town centres performance has been undertaken in this study.

3.2 Monitoring Data

The research and monitoring team holds information on new permissions granted for retail. The team also monitors annually the number of shop units, the types of uses and the vacancy rates for the centres below (written in blue are identified district centres):

Area	Total no of units	Population
Weston-super-Mare	634	74920
Clevedon	145	21957
Nailsea	142	17432
Portishead	90	17130
Queensway, North Worle, Weston	12	9933
Worle High Street, Weston	95	9396
Locking Castle, Weston	8	9081
Clevedon Hill Road	70	5763
Yatton	24	5313
Backwell	45	4151
Long Ashton	23	3659
Pill & Easton-in-Gordano	22	3433
Congressbury	30	3011
Winscombe	54	2640
Banwell	14	2192
Wrington	22	1995

4. ISSUES & OPTIONS FOR THE CORE STRATEGY

Given the above policies and existing evidence, the following issues and options need to be addressed and explored in the Core Strategy to support the locational strategy developed in the settlement function and hierarchy topic paper:

A. Establish the current hierarchy and network of centres and how the role of different centres will contribute to the overall spatial vision for the area.

- The LPA needs to identify the role and functions that the different centres play in the hierarchy. For example, does Weston-super-Mare perform a City Centre function and Clevedon, Nailsea and Portishead town centre functions?
- The retail centre classification needs to tie into the settlement classification system, including sustainability objectives – e.g. should Yatton and Nailsea/Backwell expand its retail offer because they have sustainable transport possibilities?
- There are options whether there should be a larger number of smaller centres to cater for day-to-day needs very locally (i.e. does Weston need 5 district/local centres + a town centre) or a few larger centres with medium-sized catchments;
- A clear strategy needs to be developed for the existing retail park at Weston and any existing out-of-centre retail parks in the other towns.

B. Establish which centres should grow or decline or where new centres should be situated (areas of significant growth or areas of deficiencies in the network) based on need.

- Gaps in the different types of retail provision need to be identified across the district and new centres need to be allocated if necessary;
- The Bristol extension, RAF Locking and the Airfield are all areas of major growth, it needs to be decided what type and size of retail centres (i.e. local or district) should be incorporated into these centres;
- The future role of Weston-super-Mare and the type of retail provision (i.e. large multiples or small specialist shops) needs to be established.
- A direction of growth/areas of growth should be identified in expanding centres
- In some of the rural areas, provision of even basic facilities might be very limited as the market has not shown any interest, what can the LPA do to deliver new centres?

C. Monitor the performance of the centres

- An improved annual monitoring system for All identified centres has to be in place

5. GAPS IN EVIDENCE

5.1 Data

Although the existing evidence base is very good for some areas (particularly Weston-super-Mare) certain areas (particularly the rural hinterland) will require further information to address the above issues and options:

- The main evidence base, the Donaldson's Retail Study, has an end date of 2021 not 2026, which requires further forecast estimates.
- Up to date information and health-checks on ALL retail centres in the district is required (including the type and number of retail uses, amount of floorspace, shopping rents, vacancy levels, commercial yields on non-domestic properties, views of residents on their centre, perception of safety and crime, state of the centres's environmental qualities and footfall counts). This includes smaller towns in the rural areas and district/local centres to establish a complete picture of the hierarchy of centres and their relationship to each other. This will require further survey work and will need to be linked back to GIS to allow for gross floorspace calculations.
- Large retail completions in Portishead have potentially changed the market share of the town, which can only be established via an additional household survey.
- Pedestrian flowcounts – these have last been done in 2002 before Civic Pride improvements – these need to be repeated in Weston-super-Mare and the other Town centres as there might have been substantial changes.

5.2 Methodologies

In addition, once the missing evidence has been gathered, there is a need to develop new methodologies to comply with policy requirements in PPS6:

- A local methodology needs to be developed to classify the retail centres below town centre level i.e. the district and local centres. They could be based on population, floorspace, sales or types of provision and should work closely with the settlement function and hierarchy.
- A methodology has to be established to set upper floorspace limits for the different types of centres to be compatible with the scale of the centres.

BIBLIOGRAPHY

Donaldsons – North Somerset Retail and Leisure Study (April 2006)

GL Hearn – Study of retailing & Town Centres for North Somerset (November 2001)

Hillier Parker – Assessment of the Vitality & Viability of Weston Super Mare Town Centre (1998)

Hillier Parker – District Shopping Study for Woodspring District Council (July 1994)

APPENDIX 1

A definition of the 4 different types of Centres is given in Annex A of PPS6:

City Centre – City Centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites.

Town Centre – Town centres will usually be the 2nd level of centres after city centres. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas.

District Centre – District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants as well as local public facilities such as a library.

Local Centres – Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

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