

CABINET (LOCAL DEVELOPMENT FRAMEWORK) COMMITTEE

25 JULY 2007

WINCHESTER DISTRICT DEVELOPMENT FRAMEWORK – RETAIL AND TOWN
CENTRE USES STUDY

REPORT OF HEAD OF STRATEGIC PLANNING

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RECENT REFERENCES:

CAB 1328 - Winchester District Local Development Framework Report – 11 October 2006

CAB 1472 - Winchester District Local Development Framework – Core Strategy Progress Report - Community/Stakeholder Participation Report - 7 June 2007

EXECUTIVE SUMMARY:

The Local Development Framework is required to make adequate provision for town centre uses over the period of the Regional Spatial Strategy and to propose an appropriate retail hierarchy for the District. These aspects will need to be covered in the Core Strategy of the LDF. In order to plan for this, an assessment of the need for retail and other town centre uses throughout the District needs to be undertaken. Specialist retail consultants have been employed to undertake this work, and also to conduct an analysis of the strengths and weaknesses of the existing centres in the District and to subsequently suggest an appropriate retail hierarchy. This work has now been completed and a draft report produced by the consultants.

This report summarises the main findings of the consultants' work as outlined in their draft report. The consultants have also been briefed to consider the capacity for accommodating the identified demand for floorspace. This aspect of their work is still on-going. The consultants' final report is due to be completed by October 2007.

The findings of the consultants will be used to plan for the future development of the District. Their information and assessment highlights retail and related issues for the District, which will be explored further through the LDF.

RECOMMENDATION:

- 1 That Members note the interim findings of the Retail and Town Centres Study that will be used to assist with the identification of issues and options for the Core Strategy and other DPDs as appropriate.

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REPORT OF HEAD OF STRATEGIC PLANNING

DETAIL:

1 Introduction

- 1.1 In CAB1328, reported on 11th October 2006, Members were given an outline of the processes needed to prepare the Local Development Framework (LDF). The report recognised that in accordance with Planning Policy Statement 12 (PPS12) the LDF needed to be prepared on the basis of a thorough understanding of the needs of the District and the opportunities and constraints that operate within it to ensure that the policies prepared were founded on a robust and sound basis.
- 1.2 CAB1328 further commented that as the Strategic Planning Team was small with a broad range of responsibilities in addition to LDF production, it would not have the time or the skills to undertake all the key elements of work including some of the more technical reports required to inform the LDF. An analysis of retail and town centre issues is one of the projects which is best undertaken by the use of external consultants. Specialist retail consultants have the technical knowledge to obtain and interpret expenditure and other consumer and retail economic trend data. Consultants are also in a position to arrange the large-scale household telephone surveys that are a necessary component of such studies.
- 1.3 To this end, a brief was written inviting consultants to tender for undertaking a study for retail and town centre uses to identify needs for such uses over the period of the LDF. A copy of the brief is attached as Appendix One. Five consultants responded to the brief and three were subsequently interviewed. Nathaniel Lichfield and Partners (NLP) were subsequently appointed to undertake the study as their tender was the cheapest bid, in accordance with the Council's Contracts Procedure Rules para 3.1 (part Cii). NLP have knowledge of the District from their previous work for the Council on the Winchester Retail Study 2003, and the subsequent update in 2006. They also have knowledge of the situation regarding town centres in Hampshire from the projects similar to this town centre use LDF study that they have recently undertaken for New Forest, Fareham and (in the past few months) East Hampshire.
- 1.4 The Study analyses the need for retail and other town centre uses across the whole of the District and considers specific needs for the town centres of Winchester urban area, Bishop's Waltham, Denmead, New Alresford, Whiteley and Wickham. Outside of this study, an audit of the smaller centres and villages is discussed in the Rural Facilities Audit report elsewhere on this agenda (CAB 1505).
- 1.5 The Study is broken down into three stages. NLP have completed Stage One and Two, and Stage Three is due for completion in late 2007, when a further report will be presented to Members. The consultants have submitted a draft report of the Study which covers the work that has been done to date. Their draft report is attached as

Appendix Two of the electronic version of this report. Due to the size of the draft report, only the conclusions have been appended to the paper version of this report.

- 1.6 The rest of this report summarises the reasons for, and requirements of, the Study and the stage which has been reached so far. A brief summary of the main points is included. This report also includes additional information on community aspirations as identified through the Sustainable Community Strategy and through the Core Strategy community/stakeholder participation undertaken earlier this year.

2 Background

- 2.1 Government guidance in PPS6; Planning for Town Centres, requires planning authorities to make adequate provision for retail and town centre uses throughout the period of the development plan. The LDF needs to plan for the Development Plan period, until the RSS expires in 2026. PPS6 requires authorities to assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations. Appropriate centres should be identified to accommodate the identified need for growth over the period of the DPD and, if necessary, centres may need to be expanded, or new centres identified. PPS6 states that sites should specifically be identified for the next five years' requirements. Authorities should also identify an appropriate retail hierarchy of centres in their plans, and conduct retail health checks of their centres.
- 2.2 The emerging South East Plan Regional Spatial Strategy identifies a strategic retail hierarchy of regional and sub-regional centres (Policy TC2). Winchester, Andover, Eastleigh and Fareham are identified as Secondary Regional Centres. Southampton, Basingstoke and Portsmouth are identified as Primary Regional Centres. Policy TC2 requires local authorities to identify and develop policies for centres within their areas. Policy TC3 states that the strategic network should be the prime focus for large scale leisure, office and culture and retail development.
- 2.3 Therefore, the consultants were briefed to undertake a needs and demand assessment until 2026, covering both quantitative and qualitative issues. They have also conducted an analysis of the centres of the District in terms of retail health checks and suggesting an appropriate retail hierarchy, at the District level. Members should be aware that health checks of Alresford, Denmead, Wickham and Bishop's Waltham are also being carried out as part of the Hampshire Market Towns Initiative. These follow a very different format, but should complement NLP's retail health checks, which follow the requirements of PPS6.
- 2.4 The retail study is set out in three stages;
- Stage One: Need and Demand Assessment
 - Stage Two: Hierarchy Analysis and Quality of Centres
 - Stage Three: Capacity Analysis

Stages One and Two are now substantially complete and the findings are contained in an Interim report (see Appendix 2). This is only a draft report at this stage and Members should be aware that some of the detailed consideration within it may change. The study is planned to be completed by late 2007. The findings so far are considered in Section 4 of this report.

3 Community Aspirations

Winchester District Sustainable Community Strategy (Update March 2007)

- 3.1 The Strategy is expressed in terms of five outcomes, and describes related changes that will occur when each of the outcomes becomes a reality. A number of priorities for action are also identified. The following outcomes and priorities are the most relevant to retailing and town centres:

Outcome 1: Health and Wellbeing

A wide range of leisure and cultural activities are available

Outcome 3: Economic Prosperity

Town and village centres are economically viable and attractive

Priority 12: Strengthen the economy in rural areas of the District

Priority 14: Enhance the contribution of tourism to the economy

Outcome 4: High Quality Environment

Essential services are provided locally, or via the internet, to avoid unnecessary journeys

Priority 19: Increase the range of services that are accessible without the need to travel; and reduce the distance travelled to services by car

Outcome 5: Inclusive Society

Everyone is able to access the services/facilities and opportunities they need in their local area or via affordable transport services...

Priority 23: Improve public and community transport services, or take other steps to improve access to services, facilities and opportunities

'Live for the Future' outcomes

- 3.2 The Council carried out a series of wide-ranging consultations during Spring 2007 to ascertain the views of communities and stakeholders in relation to the sustainable planning of the District for the future. These views form part of the evidence base for the Core Strategy and other DPDs as appropriate. The results of this campaign are reported in detail in CAB1472 Appendix A, "Report of Proceedings of the Winchester Local Development Framework Core Strategy Campaign 'Live for the Future'".
- 3.3 Nine community planning events were held across the District. Participants at these events were asked where they travelled to access various goods and services, how they travelled to these, and how they would prefer to access these goods, services and facilities. The results from the community events as reported in the 'Report of Proceeding...' indicate that over 80% of participants undertook their everyday top-up shopping locally, either within their Parish or an adjoining Parish and only 12% went outside the District for this type of shopping. However, only 43% shopped locally for their weekly/monthly food shop and some 35% shopped outside the District. 4% used the internet. For bulky goods, CDs/books and for clothes/shoe shopping, under 20% shopped locally and half the participants or more, shopped outside the District. 27% of participants shopped on the internet for their bulky goods or CDs/books. 57% of participants either went within the Parish or adjoining Parish for their evening/social activities and 29% went outside the District. When asked where they would prefer to go to access goods and services, 75% said within their own or adjoining Parishes and only 12% preferred to travel outside the District.

- 3.4 The above results are from the participants at the community planning events and as such are indicative of the views of residents from across the District. There were also variations between the different locations where the events occurred, which are masked in the above figures, as these results are a combination taken from all the events held across the District. However, NLP asked similar questions across the District, using a much larger sample, and the results are broadly comparable (see paragraph 4.1 below). These results illustrate the role that the local areas play in fulfilling many retailing and town centre activity requirements.
- 3.5 The participants at the community planning events were also asked questions regarding their likes and dislikes in relation to their locality in relation to several themes and what they felt needed to change over the next 20 years, striving towards sustainable development. It is difficult to draw conclusions from the results in relation to this topic, as retailing was not a specific concern in most areas except Whiteley. The other factor mentioned several times was the perceived lack of leisure opportunities for young people, including evening activities. Residents' opinion of the retailing offer in their nearest town centres was also considered in the NLP survey (see paragraph 4.1 below).
- 3.6 A young persons event was held, targeted at 11-16 yr olds, and the 8-9yr olds in a Winchester Primary School was also visited. A common theme that emerged from these discussions was that it is important for young people to have easy access to shops, services and other facilities. Young people would wanted shops and sport and recreation facilities in the future. They wished to see more recreation, entertainment/leisure facilities provided.
- 3.7 The 'Live for the Future' campaign included a questionnaire, which asked respondents to rank a series of statements in order of importance for sustainable communities of the future. Although there were no direct questions relating to retail, respondents considered it very important that facilities and services and infrastructure should match any planned growth in housing and, also very important that 'everybody has access to the services/facilities they need'.
- 3.8 A Citizen's Panel questionnaire (October 2006) included a section on future planning and the results were included in CAB 1472. The questionnaire covered a variety of topics. Respondents were asked to rate where they lived in respect of 'the range of services and facilities it has to offer'. Approximately 50% thought it 'excellent/good', nearly 40% considered it 'acceptable', and 20% considered it to be 'poor/unacceptable'. When asked to consider the 'accessibility to neighbouring areas for work, shopping, or leisure purposes', 50% considered it 'excellent/good', 30% considered it 'acceptable' and approximately 10% considered it to be 'poor/unacceptable'.

4 Summary of Town Centre Study: Findings to date

Stage One: Need and Demand Assessment

- 4.1 The consultants undertook analysis in order to quantify the need for retail, leisure and other town centre floorspace up to 2026. NLP estimated the catchment area of Winchester City and the other town centres of the District. In order to assess consumer spending patterns and preferences, a comprehensive household survey was undertaken. This was outsourced to a specialist market-research company who undertook over 1000 interviews across the estimated catchment area providing a demographically representative sample. The results of the questionnaire will be

appended to the consultants' final study report. The key findings of the household survey are summarised below:

- Large food stores are the primary destinations for main food shopping and the preferred location of these food stores varies significantly throughout the study area.
 - Over 80% of respondents indicated that they undertook small scale shopping or top-up shopping trips in addition to their main food shopping trips. The location for the majority of the top-up shopping trips varied with the majority of these being carried out in local shops.
 - Winchester was the most popular location for non-food shopping in the north and centre area of the District, but other significant locations were Fareham, Denmead, Waterlooville, Romsey and Eastleigh. In general, non-food shopping was undertaken in the most convenient larger centre to that zone.
 - A high proportion of respondents use the car as their main mode of travel for their food and non-food shopping, while quite a low proportion use the bus or walk.
 - For each centre the majority of respondents did not identify any potential improvements that would make them shop more often in their respective centre. Where a suggestion was made, improving the choice of shops in general was the most often cited response, followed by a better variety of clothing shops and more car parking.
 - A reasonably high proportion (47.8%) of respondents buy items regularly on the internet. Of those respondents who do, books/CD's/toys etc are their main purchases.
 - When using leisure facilities, the distance travelled by respondents varies according to the activity and the facilities available in the zone. Popular locations for leisure activities were found to be Portsmouth, Southampton, Basingstoke and Fareham. The survey's findings in relation to leisure and the consultants' conclusions on this subject are summarised in Appendix 3.
- 4.2 PPS6 requires a quantitative analysis of need. NLP used data on future consumer spending levels and combined them with the predicted growth rates for convenience and comparison goods. Hampshire County Council population projections were added in, to provide estimates of the available spending within the study area until 2026. This showed a potential increase in convenience goods spending of 32% and an increase in comparison goods spending of 129% over the 20 year plan period.
- 4.3 The study also identified 'leakage', where potential expenditure is spent outside the catchment area. Around 55% of convenience expenditure is outside the District. There is considerable variance across the District: closer to Winchester, the majority of convenience expenditure is within the Winchester urban area, whereas in the southern part of the District there is a degree of leakage. This reflects the availability of large convenience stores in centres adjoining the District (Southampton, Fareham, Portsmouth and Havant). 70% of comparison expenditure was outside the District. Again, this reflects the nearby regional shopping centres of Southampton and Portsmouth (in particular), but also Basingstoke, Andover, Eastleigh, Fareham and Waterlooville.
- 4.4 Based on the above amounts of projected convenience expenditure and levels of trading and leakage, NLP were able to provide estimates of floorspace requirements within Winchester urban area, and the rest of the District for each five year period up until 2026. Existing known commitments (e.g. Silver Hill) were taken off the figures.

The figures are not quoted here, as they are subject to checking and finalising by the consultants. Despite this, it is possible to state a few generalisations with a degree of confidence. Firstly, figures suggest that existing commitments will absorb the majority of expenditure growth up to 2011. Over the next 5 yr period (ie up till 2016) the figures indicate a possible need for small-medium sized development, and for the period 2016 – 2026 there is a possible need for a new food superstore. However, the later forecasts in particular must be viewed with caution and NLP recommend monitoring of these figures. There is a similar need for additional convenience floorspace identified for the rural areas; however, this would be spread throughout the whole of the District.

- 4.5 Similar calculations were conducted for comparison expenditure. In the short term, for the Winchester urban area, the priority will be the implementation of the Silver Hill development. In the longer term post 2011, the study suggests that opportunities for significant development may need to be identified within the City, if Winchester is to maintain its place in the shopping hierarchy. Elsewhere in the District, the study suggests that there is also scope to improve comparison shopping as indicated by the expected growth in expenditure and the overtrading figures. The impact of this would vary depending on whether the new floorspace was distributed amongst the existing centres, or concentrated in one or two locations.
- 4.6 More definitive figures for floorspace requirements will be published when NLP's final report is published in late 2007.

Stage Two: Hierarchy Analysis and Quality of Centres

- 4.7 NLP were asked to undertake an analysis of the quality of the town centres of the District. This will identify the strengths and weaknesses of the centres and suggest where these could be built upon or where extra investment may be required. This is in accordance with PPS6, which requires that retail health checks be undertaken for town centres. These results will inform the development of an appropriate retail hierarchy of centres for the District, as also required by PPS6.
- 4.8 NLP carried out site visits and subsequent analysis of the town centres of the District as identified in the Local Plan Review 2006, i.e. Winchester, Bishop's Waltham, Denmead, New Alresford, Whiteley and Wickham. They intend to undertake further analysis and checks on their data: however, it is possible to report their conclusions to date.
- 4.9 In summation, the centres of the District appear to be performing well, with the exception of Whiteley. There are low levels of vacant units and the quality of the environment is generally good. The centres offer a variety of convenience and comparison shopping. Specific strengths and weaknesses for each centre are identified in the draft report, although a general comment is a lack of available large sites for future development and a relatively low provision of evening entertainment, food and drink. Whiteley has a high proportion of vacant units and a restricted range of retailing and town centre uses. Poor public transport links were also identified for Whiteley.
- 4.10 The consultants also looked at potential local centres/parades of shops within Winchester City. As a result of their analysis of the existing provision, they have suggested a revised retail hierarchy for Winchester District. This is shown as table 16.1 included within their conclusion, attached as Appendix 2 of this report.

- 4.11 The current hierarchy in the Local Plan Review identifies Winchester City as the main town centre, but then considers all the other centres as having equal weight. No local centres are designated within Winchester urban area. NLP consider that PPS6 suggests a finer grain of hierarchy, with a more even distribution of centres. This would provide firmer guidance of the types and scale of development that would be appropriate in each centre. Their suggestion is the separation of Winchester from the rest of the centres, which should be re-classed as District Centres. An additional class of Local Centres is identified, which consists of Denmead and local centres in Winchester urban area (i.e. Weeke, Oliver's Battery and the Stockbridge Rd/Andover Rd junction).

5 CONCLUSION/NEXT STEPS:

- 5.1 At this stage, the consultants consider that there is no need for substantial additional retail floorspace within the next 5 years in the District. However, the growth figures suggest that there will be considerable need in the longer term, particularly in relation to comparison shopping. Due to the nature of the demand, it is likely that most of this will need to be provided within or nearby to, Winchester urban area. The figures show that there is scope for retail development in other parts of the District, although there is no pressing need.
- 5.2 The consultants will now be working on the final stage of the study, which will be considering the capacity of the centres to meet the identified need. This will involve an initial consideration of potential areas for development.
- 5.3 Stage 3 of the study is planned to be completed in late 2007. At this time, the report will be finalised. As the report is currently only an interim report, it may be the case that the floorspace figures and other aspects currently in the report may change. Members should be aware that although stages one and two are substantially complete, the report is currently in draft and subject to final editing and checking.
- 5.4 When the final report is complete, the consultants will be making a presentation of their findings to officers and Members.
- 5.5 The findings of the final report will provide valuable evidence for the LDF. It will be particularly important in terms of determining the hierarchy of settlements and areas of potential growth, and in planning for local service centres in the rural areas. The study will also inform policies relating to any possible identification of areas for town centre development and for policies for the control of development of town centre uses.

6 CORPORATE STRATEGY (RELEVANCE TO):

- 6.1 The use of consultants on this key project will contribute to the Council's priority of economic prosperity. The outcome of the project is for the development of a sound and robust evidence base that will inform Council's LDF. This will led to the development of policies that will provide the infrastructure for business to succeed and contribute to the creation of vibrant city, town and village centres, tourism and the rural economy of the District.

7 RESOURCE IMPLICATIONS:

- 7.1 The appointment of consultants to undertake this project has been funded from the LDF growth bid agreed by Cabinet in February 2007.

BACKGROUND DOCUMENTS:

None.

APPENDICES: NONE FOR THIS DRAFT CIRCULATION – BUT ARE AVAILABLE FROM STRATEGIC PLANNING IF REQUIRED

Appendix 1 Consultant's Brief

Appendix 2 NLP Interim Retail and Town Centre Uses Study June 2007 (Conclusions and Recommendations)

Appendix 3 Summary of Leisure Findings

APPENDIX ONE: CONSULTANT'S BRIEF

**WINCHESTER DISTRICT DEVELOPMENT
FRAMEWORK**

Retail and Town Centre Uses Study

April 2007

2 Purpose

- 2.1 To conduct an analysis of current and projected town centre needs in the District until 2026. To inform the Local Development Framework process, in particular the Core Strategy and planning for the settlement hierarchy of the District

3 Aims

- 3.1 Quantify the need for retail, leisure and other town centre uses throughout the District over the next 20 yrs (until 2026).
- 3.2 Devise an appropriate hierarchy of town centres to assist the provision of these needs.
- 3.3 Identification of centres and sites to accommodate any additional floorspace requirements.
- 3.4 All work should meet the requirements of Government guidance (PPS6, etc) and best practice advice. The evidence, analysis and conclusions should be robust and of a 'sound' standard.

4 Background

- 4.1 Winchester District lies within central/southern Hampshire bordered by Basingstoke and Deane, Portsmouth, Havant, Fareham, Test Valley, Eastleigh, and East Hampshire local authorities. A number of these are influential in the way Winchester District functions and is used by its residents.
- 4.2 The District covers an area of 64,750 hectares with a resident population of some 112,500 people. The District is mainly countryside interspersed with many small towns and villages. The main centre for commercial activity is the city of Winchester. The other designated town/village centres in the District are - Bishops Waltham, Denmead, New Alresford, Whiteley and Wickham.
- 4.3 The planning framework for the District consists of the Hampshire County Council Structure Plan (Review) and the Winchester District Local Plan Review (WDLPR) 2006. The HCSP has largely been superseded by the emerging Regional Spatial Strategy (RSS) – the South East Plan. This Study should consider the implications of policies within the emerging RSS for town centre planning in Winchester District.
- 4.4 The South East Plan designates two areas adjoining the District for major housing allocations – Fareham & north of Hedge End Strategic Development Areas (SDAs). Fareham SDA is on the boundary of the District and a small part may impinge on Knowle. A significant part of the proposed Hedge End SDA will be in Winchester. The Plan contains a Strategic Network of Town Centres and identifies retail catchments and Sub-Regional Strategy Areas which make specific reference to Winchester.
- 4.5 A major redevelopment of part of Winchester town centre has recently been granted planning permission. The Silver Hill development will contain a significant amount of new retail and other town centre uses.

- 4.6 The WDLPR contains policies for town centres under the 'Town Centres, Shopping and Facilities' Chapter. This chapter contains the Council's current strategy in terms of town centre hierarchies, acceptable uses within town centres and primary shopping frontages. It includes the Council's policies for dealing with planning applications in these areas. The boundaries of the identified town/village centres and the primary shopping frontages are shown on the Proposals Map. These policies will be considered for review as part of the Local Development Framework (LDF) process.
- 4.7 Following the adoption of the Local Plan Review in July 2006, the Council is concentrating on developing the LDF. The Council's Statement of Community Involvement (SCI) was adopted in January 2007 and initial front-loading work has begun on the Core Strategy. The timetable for the production of documents comprising the LDF is outlined in the Council's Local Development Scheme (LDS). This study will form part of the evidence base of the Core Strategy Development Plan Document.
- 4.8 The Core Strategy issues and options consultation will be between July – December 2007. Submission is planned for September 2008, with the public examination commencing in April 2009 and the adoption of the Core Strategy in December 2009. This timetable has yet to be agreed with GOSE. The existing adopted LDS which dates from 2006 is available on the Council's internet site. The first stage of this study will inform the issues and options consultation and the whole study will need to be completed to feed into the 'preferred options' consultation document by December. Consultants may need to be available for the public examination programmed for April 2009.
- 4.9 The Council has commissioned consultants to undertake a Sustainability Appraisal and SEA of the District. Initial outcomes of this are expected during the late spring. This Town Centre Study will need to take account of this ongoing work and ensure that the study's recommendations are compatible with the Sustainability Appraisal. The Appraisal will produce targets, indicators and monitoring guidelines which this Study will need to take account of, when available.

5 Scope

- 5.1 The study should provide an analysis of the District in terms of the uses outlined in paragraph 1.8 of PPS6. However, it is expected that the focus will be primarily on retail. The needs assessment should encompass retail and commercial leisure/entertainment. The need for arts, culture and tourism development should be assessed as completely as possible, using secondary data. There will also be a need for office development within town centres, the quantitative need for this will be considered as part of a separate economic and employment study which is currently being commissioned, although this study will need to make an allowance for office uses based on the findings of that study (if project timescales allow) and knowledge of trends in this sector in this region.
- 5.2 The study should focus on the needs of the geographical area of the District. However, the study should identify where the catchments of town centres extend into other Districts and where the catchments of places from outside the District encroach into Winchester District.

6 Requirements (Project Specifications, procedure)

6.1 The study will be broken down into three stages as follows:

Stage One: Needs Assessment

6.2 The study should identify the quantitative and qualitative need for retail, leisure and other town centre floorspace over the plan period up to 2026, with assessments for each 5yr period within this time. This needs to be by sector, both for the District as a whole and individually for each of the identified centres of the District.

6.3 The analysis should identify existing and projected catchment areas for convenience and comparison goods, retail warehousing and leisure development. An expenditure analysis of current and projected expenditure should be undertaken for these sectors and should identify any expenditure leakage (or gains) for the District or individual centres. As part of this, consultants should review any major current or planned retail developments in adjoining centres and their potential impact on the District.

6.4 A retail study has been undertaken by Nathaniel Lichfields and Partners on the retail capacity of Winchester City in 2003. The data was subsequently updated in November 2006 to assist with the assessment of major retail applications in the City at that time. The 2003 study is available via the following link:

<http://www.winchester.gov.uk/EnvironmentAndPlanning/Planning/LocalDevelopmentFramework/BackgroundDocuments/General.asp?id= SX9452-A781B805&cat=8141>

6.5 It is anticipated that household surveys will need to be undertaken. Bids should identify how this will be undertaken, whether this will be outsourced and identify the cost. The Council requires a survey of the uses within the town centre boundaries currently identified in the WDLPR. This will form part of this study and the results should be made available to the Council to form part of a database for future monitoring. Bids should identify how this would be undertaken and identify the specific costs of this element of the study.

6.6 The analysis will need to take account of the population changes arising from the SDAs and other housing growth identified in the emerging South East Plan, so far as locations for growth are known. Officers will brief the consultants on the likely development options, which may result in different patterns on retail development. The consultants should use the population projections prepared by Hampshire County Council in making their assessments.

Stage One Output:

6.7 Report identifying the catchment areas for the centres of the District, present expenditure data analysis and identify any leakages from the centres. The report should quantify the floorspace requirements for convenience and comparison retailing, retail warehousing and leisure use, by individual centre, including different options for development as necessary. Report to also identify the current capacity of the centres to meet this demand.

6.8 Consultants to be available to discuss the results of Stage One with Officers, by email, letter and telephone and make any appropriate amendments to the draft.

Stage Two: Hierarchy Analysis and Quality of centres

- 6.9 Conduct a health check on the identified centres. This should use the indicators outlined in paragraph 4.4 of PPS6 as a guideline, however it may be possible to deviate from these as agreed with the Council before the commencement of the Study. The consultants should be aware that several large towns in the District are currently conducting their own market town health checks.
- 6.10 The consultants should analyse the strengths and weaknesses of the centres in the District. This should include discussions with retailers and relevant stakeholders. The study should identify any specific roles or niche markets that these centres serve. Based on this, together with demand analysis from Stage One, suggest centres where growth could occur and where specialist roles could be developed. Suggest a hierarchy of centres for the District (including within Winchester City if appropriate), taking into consideration the advice in PPS6, the Strategic Network of Town Centres, catchment areas and sub-regional retail strategies outlined in the draft South East Plan, and any initial findings of the Winchester Sustainability Appraisal. The analysis should highlight settlements that are, or could develop into, Local Service Centres in the rural areas; and attention is drawn to paragraphs 3 & 6 of PPS7, paragraphs 2.60 – 2.64 of PPS6 and Policy BE5: the Role of Small Market Towns in the South East Plan.
- 6.11 Consultants should propose a framework for future monitoring of town centres. This should be based on paragraphs 4.2 – 4.4 of PPS6, the Indicators outlined in the RSS, any applicable findings from the Winchester Sustainability Appraisal and the consultants own market knowledge. Indicators and methodologies should be proposed following discussions with Council officers, to meet the requirements of national AMR Indicators, the South East Plan and the measures of vitality and viability outlined in paragraph 4.4 of PPS6.

Stage Two Output:

- 6.12 Report containing the health check results for each centre. Report should contain the analysis referred to in 5.10 above, clearly set out for each of the centres. The report must propose a town centre hierarchy for the District, or several options/scenarios for the hierarchy if applicable, with a reasoned justification. Report to identify indicators for monitoring and propose methodologies for future collection of health check data.
- 6.13 Consultants to be available to discuss the results of Stage One with Officers, by email, letter and telephone and make any appropriate amendments to the draft.

Stage 3: Capacity Analysis & Site Identification

- 6.14 Explore the capacity of the centres to meet the demand identified in Stage One. Identify the options for each centre to meet this demand, including recommendations where town centres should be expanded, building on the Stage One and Two analyses. The consultants should consider where town centres should be expanded (or contracted) and indicate the general geographical areas where this should be. Large sites with potential for meeting floorspace needs should be identified, along with any constraints.

- 6.15 Having discussed the findings of Stages One and Two with the Council, the consultants should develop scenarios involving maintaining existing levels of expenditure or obtaining some element of clawback if appropriate. It may be appropriate to consider the designation of additional sites, either in town centres, edge of centre or out of centre.

Stage 3 Output:

- 6.16 Report to recommend options for altered boundaries for town centres where appropriate for both current level expenditure and clawback as required following discussions. If any additional out of centre sites are proposed, the report should identify these potential sites, and provide an explanation of why they are required and an assessment of their deliverability.
- 6.17 Consultants to discuss the Stage Three Report with officers and make any required amendments, before presenting their findings to the Council (Officers and Members) at a meeting. The presentation will be expected to cover the main points of all three stages of the Study and its content should be agreed with officers beforehand.

7 Background Documents

- 7.1 The following documents will inform the study:

- Planning Policy Statement 6: Planning for Town Centres
- Regional Planning Guidance for the South East (RPG9)
- South East Plan
- Hampshire County Structure Plan Review (2001)
- Hampshire Town Centre Qualitative Assessment Survey 2000
- South Hampshire Town Centres: Sub-Regional Study 2005 (DTZ)
- Winchester District Local Plan Review (WDLPR) 2006
- Winchester Retail Study 2003 (NLP)
- Winchester Retail Study Update November 2006 (NLP)
- Winchester District Local Development Scheme 2006 (or 2007 when approved)

- 7.2 Work in progress that will also inform the study:

- Winchester Sustainability Appraisal (contact Jenny Nell WCC)
- Winchester Economic and Employment Study (contact Jenny Nell WCC)

8 Bid Specifications

- 8.1 Bidders should submit one electronic copy and one unbound paper copy of their tender. Bidders should provide the information outlined below to the Council, itemised for costs including VAT:
- 8.2 Details of how the requirements of the Brief in Section 5 will be achieved. Bids should specify the methodologies they will utilise for each stage of the Study. Bids should identify how information will be obtained eg – desk-top search, collection of primary data, surveys etc and what sources will be used for calculating expenditure and turnover.

- 8.3 Preparation and appearance as expert witness for the Council at the Examination in Public, if necessary (to be identified separately, based on an hourly/day rate plus expenses)
- 8.4 Costs of attending any meetings or workshops additional to those required in Section 5, including expenses
- 8.5 Each stage of the study should be itemised separately. Bids should identify the costs involved in any data collection that may be required. In particular the following elements should be individually costed:
- The household survey
 - The survey of existing use classes
 - The health check assessment and developing of indicators
 - Costs of giving a presentation to explain the project and its findings (the final report).
- 8.6 Bids should also include the following information:
- Company name and contact details
 - CV's of the person(s) who will carry out the work including grade, qualifications and experience
 - Hourly/day rates for each individual involved
 - Details of liaison and reporting mechanisms between the consultant and the Council
 - Details of any conflict of interests and how the consultant is proposing this issue will be managed.
 - Examples of any similar studies the consultants have undertaken.
 - Two references
- 9 Selection Process
- 9.1 Prospective bidders should provide the information required in section 7 above to the address given below by 4pm on Monday 23 April 2007.
- Steve Opacic
Head of Strategic Planning
Chief Executive's Unit
Winchester City Council
City Offices
Colebrook Street
Winchester
SO23 9LJ**
- 9.2 Candidates shortlisted, will be invited to interview and to give a presentation on 2nd May 2007.
- 9.0 Timescale
- 9.1 Expected timescale of the study is as follows;

Brief to consultants	04 April 2007
Submissions returned by	23 April 2007
Interviews	02 May 2007
Appointment made	04 May 2007
Commencement of work	07 May 2007
Stage One completion	15 June 2007
Stage Two completion	01 July 2007
Stage Three completion	28 September 2007
Study completion signed off by WCC	16 November 2007

10 Conditions

- 10.1 The Council may withdraw from using the services of the consultant at any time during the project if it is not satisfied with the standard or quality of the work.
- 10.2 Payment of fees will be at the end of each Stage completed, subject to the Council's satisfaction.
- 10.3 Any work outside the specification of the Brief, or as subsequently agreed in writing between the Council and the appointed consultants, will be considered as additional work. The parties must first agree the content and cost of any such work before it is undertaken.
- 10.4 No part of the study should be sub-contracted to third parties without the Council's prior consent.
- 10.5 The Council will own the copyright of the Report and supplementary document and will copy, publish and distribute it as required.
- 10.6 The final report should :-
- Follow the Council's corporate style, to include the Council logo and LDF branding
 - Provide 6 bound colour copies
 - Provide a black and white version for copying purposes
 - Include text, graphs, tables and photos as necessary
 - Be provided in MS Word and PDF formats to enable the report to be stored/manipulated electronically and placed on the Council's website

11 Project liaison

- 11.1 Contacts for the study are as follows:

Steve Opacic
Head of Strategic Planning
Chief Executive's Unit
Winchester City Council
City Offices
Colebrook Street
Winchester
SO23 9LJ

sopacic@winchester.gov.uk

01962 848 101

Joan Ashton
Senior Planning Officer
Address as above

jashton@winchester.gov.uk
01962 848 442

APPENDIX TWO: NLP Interim Retail and Town Centre Uses Study June 2007 (Conclusions and Recommendations)

- 1.1 This report provides a district wide needs assessment for retail and commercial leisure uses in Winchester District. It provides a guide to the shopping and leisure needs of the District up to 2011, 2016, 2021 and 2026. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Winchester District

- 1.2 Growth in expenditure should provide opportunities to improve the range and quality of shopping and leisure facilities within the District. Taking account of existing commitments there is limited potential for additional convenience and comparison shopping facilities in Winchester up to 2011. However, there could be scope for smaller scale development in the other centres in the District. Future planning policy and site allocations should seek in line with PPS6, to identify opportunities to accommodate growth at least up to 2016. Longer term growth up to 2021 and 2026 should be monitored and updated as necessary.
- 1.3 The floorspace projections shown in this report provide broad guidance. Meeting the projections between 2007 and 2016 remains the priority, and longer term objections need to be monitored. All the projections should not be considered to be maximum/minimum limits or targets, particularly when translated into the development plan allocations or when used to guide development control decisions. Such floorspace limits should not inhibit competition between retailers when located within centres, subject to the consideration of scale and impact. However, if an out of centre proposal exceeds the floorspace projections then the need for the proposal and impact will need to be carefully considered.
- 1.4 Long term forecasts (beyond 2016) may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2016 is attributable to projected growth in spending per capita, extrapolated from short to medium term growth projections. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

Convenience Development

- 1.5 On the basis of the assumption that existing convenience retailers trade at reasonable average turnover levels, the quantitative capacity analysis indicates there

is potential for further convenience goods sales floorspace within the District. There is limited scope to accommodate additional floorspace up to 2011 in Winchester.

- 1.6 In the period 2011 to 2016 there may be scope for further food store development in Winchester, e.g. extensions to existing store or a new small to medium space store. However, it is unlikely that a large scale superstore will be required in Winchester by 2016. In the longer term (up to 2026) there could be scope for a superstore but the need for this store would need to be monitored. There is no need to allocate a site for a new superstore at this stage.
- 1.7 The strategic options for meeting the need for convenience retail development in Winchester are as follows:
- Short Term (up to 2011) - limited potential only small scale development (subject to PPS6 tests)
 - Medium Term (2011 to 2016) - small to medium scale development i.e. extensions to existing stores or a medium sized new store;
 - Long Term (2016 to 2026) - possible new for new food superstore located within a new district centre serving major new residential or a new out-of-centre store.
- 1.8 Elsewhere in the District there is scope to improve food store provision in the other main towns subject to the availability of town centre/edge-of-centre sites. The need for new floorspace could be distributed amongst each of the centres and the new MDA or concentrated in one or two locations. This may be determined by the availability of suitable sites.

Comparison Development

- 1.9 In the short-term the development strategy should encourage the implementation and occupation of the Silver Hill development in Winchester. In the longer term (after 2011) further opportunities for significant development need to be identified if Winchester is to maintain its position in the comparison shopping hierarchy.
- 1.10 The strategic options for meeting the need for comparison retail development in Winchester are as follows:
- Short Term (up to 2011) - implementation of the Silver Hill development and possibly other small scale development (subject to PPS6 tests)

- Medium to Long Term (2011 to 2026) - identify a opportunities for further major expansion in the town centre, and/or an out-of-centre retail park development or accept Winchester position in the hierarchy may decline.
- 1.11 Elsewhere in the District there is also scope to improve comparison shopping provision. Development should normally be appropriate to the scale and function of existing centres unless the potential to enhance the role of a centre is identified i.e. development sites are available. Again the need for new floorspace could be distributed amount each of the centres and the new MDA or concentrated in one or two locations.

Commercial Leisure Development

- 1.12 The provision of leisure, entertainment and cultural facilities within the District is limited but reflects the size of its catchment and the fact that residents also have good access to facilities in neighbouring towns.
- 1.13 There is potential to improve facilities in Winchester. The other towns in the District may only be capable of accommodating small scale commercial leisure facilities.
- 1.14 In Winchester, major commercial leisure could be accommodated within town centre development if sites are available. Alternatively an out of centre Leisure Park could be considered.

The Role of Shopping Centres

- 1.15 PPS6 indicates that local planning authorities should adopt a positive and proactive approach to planning for the future of the centres within their areas, whether planning for growth, consolidation or decline. Local planning authorities are expected to set out a vision and strategy for the pattern and hierarchy of centres, including town, district and local centres within their area. This strategy should set out how the role of different centres will contribute to the overall vision for their area.
- 1.16 The current Local Plan does not adequately define the hierarchy in the District. Winchester town centre should continue to act as the principle centre within the District for shopping, leisure and entertainment activities. Bishop's Waltham, Wickham, New Alresford and Whiteley should complement Winchester town centre by providing for convenience food shopping and a reasonable range of comparison shopping facilities and other services. The local centres are also expected to cater for top-up and basket convenience shopping and services, but are likely to provide a more limited range of comparison shopping.

- 1.17 The sequential approach indicates that town, district and local centres are the preferred location for new retail/leisure/cultural development. Development should be appropriate in terms of scale and the catchment area the centre serves. Therefore, large-scale development should be concentrated within the larger centres, i.e. in Winchester.
- 1.18 Some forms of development may be more appropriate in smaller centres, if there are localised areas of deficiency. The key issues are the nature and scale of retail/leisure development proposed and the catchment area the development seeks to serve. Development should normally be consistent in terms of scale and nature with the character and role of the nearest centre. Therefore, development plan policies should provide clear advice in this respect. In general development within local centres should primarily serve the village/settlement within which it is located, and perhaps smaller nearby settlements which do not have a local centre. Local centres/parades within the main towns, i.e. in the urban area but outside the town/district centre serving that town, should primarily serve walk-in catchment areas, approximately 500 metres from the centre.
- 1.19 PPS6 suggests that local authorities should adopt policies that enable town, district and local centres to meet the needs of residents of their area. The sequential approach indicates that the first preference for new developments should be within centres followed by edge-of-centre sites in town and district centre locations. Out of centre sites are last in the order of preference.
- 1.20 As indicated, development within all centres should be appropriate in terms of nature and scale to the role of the centre. Developments which are likely to attract customers from a significantly wider area than the centre's intended catchment area may be considered to be out-of-scale with the role of the centre, and may be better located within a larger centre, if alternative sites are available, which would meet the identified need. Again, each proposal would need to be considered on its individual merits. The recommended hierarchy of centres for the District is shown below. This hierarchy will help to inform what scale of development may be appropriate in each centre.

Table 16.1 Recommended Hierarchy of Centres

Status	Centre
Sub-Regional Town Centre	Winchester town centre
District Centres	Bishop's Waltham New Alresford

	Whiteley Wickham
Local Centres	Denmead Weeke Stockbridge Road/Andover Road Oliver's Battery
Local parades	All other small clusters of local shops (less than 10 units)

- 1.21 The distinction between town, district and local centres is important when applying the sequential approach, which will assist the consideration of scale when determining proposed retail/leisure schemes. As a rule of thumb development in Winchester should serve a relatively wide area including most parts of the district.
- 1.22 Development plan policies should continue to seek to concentrate shopping development within defined centres and the clear guidance in relation to what type of development will be appropriate in each type of centre should be maintained.

Winchester Town Centre – Strategic Objectives

- 1.23 Winchester town centre should be maintained as a sub-regional centre. As the main centre in the District it should serve the District as a whole, and should embrace a wide range of activities. The centre should function as the main comparison shopping destinations in the District and also the main destinations for leisure, entertainment and cultural activities that serve the District's residents.
- 1.24 In order to maintain and enhance this role, the town centre should be the focus for major comparison retail developments. To meet the District's need for retail and other town centre uses major development is required in the town centre in the medium to long term. An appropriate balance of uses needs to be maintained and existing town centre uses should be protected. The study has identified a need for new retail development and Class A uses in general, over and above the existing commitments in the medium to long term 2011 to 2026.

District Centres – Strategic Objectives

- 1.25 Bishop's Waltham, Wickham and New Alresford and possibly Whiteley could be designated as District Centres, which would complement Winchester town centre by providing for convenience food shopping (i.e. anchored by small/medium sized food stores) and a small range of comparison shopping facilities and other services to serve their respective parts of the District. These are important shopping/service

centres and their roles should be maintained to ensure they provides an appropriate range of facilities and services.

- 1.26 Development plan policies should indicate that new shopping and leisure development will not be permitted within these centres where the development would serve a district wide catchment area. Development should also not be permitted where it will have an unacceptable impact on the shopping hierarchy.

Local Centres – Strategic Objectives

- 1.27 Within the District local centres should be designated, including Denmead. These centres have a more limited range and choice of comparison shopping than district centres. The future priority for the local centres should be to consolidate and maintain their roles as important local centres providing basic food and grocery shopping facilities, supported by a limited choice and range of comparison shops selling lower order comparison goods (bought on a regular basis) and a range of non-retail services and community uses. Core facilities should include convenience stores, post office, newsagents and pharmacy.
- 1.28 Development within these centres should be commensurate with this role and limited catchment area. Opportunities for small scale development to provide additional shop premises should be encouraged, as should the reoccupation of any vacant premises.
- 1.29 The key facilities that should be encouraged protected in local centres include:
- food supermarket or convenience store;
 - Post Office counter;
 - newsagents; and
 - chemist.
- 1.30 Other desirable facilities include:
- banks (or ATMs);
 - off license;
 - takeaways/cafés;
 - public house;
 - optician;
 - hairdressers/barbers;
 - bookmakers;
 - dry cleaners;
 - DVD/video hire shop;
 - shoe repair;
 - health centre, dentist etc.;

- library;
- schools; and
- community hall.

1.31 The ability to protect these uses will be constrained by permitted development rights and the Use Class Order. However, where a change of use or redevelopment would result in the loss of a key facility or Class A or community facilities then the applicant should demonstrate that the proposal will not harm the vitality and viability of the centre.

APPENDIX THREE: SUMMARY OF LEISURE FINDINGS

The survey results in relation to leisure activities are outlined below:

- When using leisure facilities, the distance travelled by respondents varies according to the activity and the facilities available in the zone. Popular locations for leisure activities were found to be Portsmouth, Southampton, Basingstoke and Fareham.
- NLP found that 54% of respondents had recently visited a cinema, which is higher than the average they have found in similar surveys across the County (48.6%). The Screen in Winchester attracted a third of all visits, with others visiting Southampton and Fareham.
- In the study area, 56% of respondents visit theatres. This compares with NLPs average from other surveys of only 38%. Southampton was the most popular location, attracting 45% of visits. The Theatre Royal in Winchester was the second – and only other significant – destination, attracting 18% of respondents' last visits.
- Over 57% of respondents visited pubs/bars, which was significantly higher than NLP's average from other surveys of 47%. The main destination for this varied significantly, but tended to relate to the nearest centre.
- Over 74% of respondents visited restaurants, which was the most popular leisure activity, and much higher than NLP's average of 63%, from similar surveys.
- Bingo proved the least popular leisure activity, with only 4% of persons participating (NLP's average is 5%). Only 9% of respondents visited nightclubs/live music venues, making it the second least popular leisure activity. The participation rate is the same as NLP have found in other areas.
- 30% of respondents visit health clubs/gyms, which is significantly higher than NLP's average from other surveys (24%). These tend to be in the respondents' local area.
- 20% of households visit tenpin bowling, visit tenpin bowling, which is slightly higher than NLP's average for other surveys (18%). The main destinations are Southampton, Basingstoke and Fareham.

Extract from NLP's Interim Report in relation to leisure and other town centre uses:

The Winchester District has limited selection of commercial leisure, entertainment and cultural facilities, but this reflects the relatively small catchment population of Winchester (about 60,000) and the localised the main towns in the district. Residents in the District have relatively good access to leisure, entertainment and cultural facilities outside the District particularly in and around Portsmouth, Southampton, Basingstoke and Eastleigh. The District's location within the catchment area of larger centres will limit the potential for commercial leisure and entertainment facilities.

There appears to be scope for additional health and fitness facilities. Published space requirements and our canvas of operators suggest there is demand from leisure and entertainment operators. There is theoretical scope for a small/medium sized cinema and bingo club if the District can retain a higher share of admissions, and possibly a tenpin bowling facility.

Future town centre development should provide additional space for these uses as well as Class A1 retail. As an average mixed use town centre development schemes could include 40% non-Class A1 commercial space, e.g. at least 10% for Class A3 to A5 uses and 30% for B1/A2 offices.