Nathaniel Lichfield and Partners

Planning Design Economics

NEW FOREST DISTRICT COUNCIL

RINGWOOD TOWN CENTRE STRATEGY STUDY

CL10387/PW/SPe/SPa

07 July 2006

Nathaniel Lichfield & Partners Ltd
14 Regent's Wharf
All Saints Street
London N1 9RL

T 020 7837 4477
F 020 7837 2277
london@nlpplanning.com
www.nlpplanning.com

Offices also in:
Cardiff
Manchester
Newcastle upon Tyne

7.0 CONCLUSIONS AND RECOMMENDATIONS

Ringwood's Strengths and Weaknesses

7.1 The main strengths and weaknesses of Ringwood town centre identified within the study are summarised below.

Strengths

- Ringwood is an attractive market town with a pleasant streetscape and many attractive period/listed buildings.
- The town centre and shopping area is compact with natural circuits for shoppers along the High Street and Market Place and through the Furlong Centre to the main public car parks.
- Ringwood has a good provision of food stores suitable for both bulk and top-up shopping. The centre is anchored by Waitrose and Sainsbury stores, the former attracts customers from a wide area. The average expenditure on food and grocery items is the highest in the District.
- The centre has a reasonably good selection of eating and drinking establishments, with the highest levels of customer and occupier satisfaction compared with other centres in the District. A high proportion of visitors visit restaurants in the centre, both during the day and in the evenings, although the overall average expenditure per visitor was low as recorded in the on-street survey.
- The centre appears to have reasonable good car parking provision with relatively high levels of customer satisfaction. However, satisfaction with car parking provision and charges was much lower amongst business occupiers. Therefore, views on car parking are mixed.
- The centre has a reasonable range of comparison (non-food) outlets, including a relatively good selection of multiples, although the choice in some categories is limited. The centre has some high quality outlets such as Hobbs.
- The vacancy rate within the centre is much lower than the national average, which suggests a reasonably good balance between the supply of premises and demand from business occupiers.
- The centre has a loyal and relatively affluent customer base, which uses the centre regularly.

Weaknesses

- Ringwood is located within Bournemouth and Castlepoint's catchment area. Southampton is also reasonably accessible. Therefore, many local residents shop outside Ringwood particularly for comparison shopping.
- The average expenditure on comparison (non-food) goods is relatively low, with about a third of customers spending nothing. This suggests that many visitors undertake food and grocery shopping only (e.g. Waitrose).
- Business occupiers were more pessimistic about past, existing and future trading performance than the business occupiers in the other three centres

surveyed. The general economy, lack of customers and competition from within the centre were suggested as key constraints to businesses.

- Cleaning the pavement and removing the chewing gum would enhance the appearance of the streetscape in Ringwood.

Ringwood's Future Role

7.2 The shopping centre hierarchy is set out in the adopted Local Plan. The six main centres are identified as town centres, and these centres will be the main focus for retail and leisure development within the District. At present Lymington, New Milton and Ringwood town centres are the main foci for comparison shopping, in particular national multiple retailers. Ringwood has a similar amount of comparison retail floorspace compared with Lymington, New Milton and Totton, and has a relatively good selection of multiple retailers, compared with Totton and New Milton, but slightly less than Lymington. Ringwood is the main centre in the west of the District and has an important role.

7.3 Ringwood should continue to be a main focus for retail and leisure development. However, the centre falls within the catchment area of Bournemouth and Castlepoint, and will not compete on level terms with these centres, particularly in terms of higher order comparison shopping and major leisure activities.

7.4 Ringwood should be maintained and enhanced as a town centre, and should continue to provide for bulk convenience food shopping and a reasonable range and choice of comparison shopping facilities and other services. The town centre should serve Ringwood and the surrounding catchment area, including some of the needs of nearby smaller towns e.g. Fordingbridge, Verwood and St Ives. The centre should function as the main comparison shopping destination in the west of the District and also the main destination for leisure, entertainment and cultural activities that serve Ringwood's residents.

Meeting Shopping and Leisure Needs in Ringwood

7.5 Phase 1 of this study indicates that growth in expenditure should provide opportunities to improve the range and quality of shopping and leisure facilities within the District and specifically within Ringwood. The assessment of the potential capacity for new floorspace within this study demonstrates that there is scope to improve shopping facilities within District. Future planning policy and site allocations should seek to identify opportunities to accommodate growth at least up to 2012. Longer term growth up to 2018 should be monitored and updated as necessary.

Convenience Development

7.6 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 about 1,700 sq m net of convenience goods sales floorspace within the District up to 2012. The projection up to 2018 is about 2,500 sq m net. Based on existing shopping patterns, the central and southern area of the District is the priority area for additional convenience floorspace. Ringwood is not identified as an area of deficiency, and the recent opening of the Sainsbury store within the former Safeway premises has reinforced this conclusion. Based on existing market shares there is no projected requirement for additional convenience goods floorspace in the Ringwood/ Fordingbridge area. However, a reduction in expenditure leakage to Bournemouth could support small scale improvements within Ringwood town centre.

Comparison Development

7.7 Ringwood should seek to maintain the centres' current position in the shopping hierarchy for comparison shopping, and where appropriate improve the centre's existing market share of expenditure. Further improvements to Ringwood's comparison shopping facilities will help to achieve this objective.

7.8 The quantitative capacity analysis indicates that, based on existing shopping patterns as a baseline scenario, there could be scope for about 2,000 sq m gross of comparison floorspace within the Ringwood/ Fordingbridge area up to 2012, or 4,000 sq m gross up to 2018. A limited proportion of this need for new comparison floorspace can be accommodated in existing vacant floorspace in Ringwood or Fordingbridge town centres, because the vacancy rate is relatively low. Opportunities need to be identified to accommodate need at least up to 2012.

7.9 Subject to the availability of suitable town centre development opportunities, it may be possible for Ringwood to improve its market share of comparison expenditure. If market share can be improved then 2,700 sq m gross could be provided by 2012 or 4,400 sq m gross by 2018. Given uncertainties relating to expenditure growth and internet sales, these floorspace projections could be viewed as maximum estimates.

7.10 The provision of large format/retail warehouse stores in the District is currently limited. If suitable development opportunities can be identified there may be potential to improve retail warehouse provision in the District, including Ringwood. On the basis that large stores, selling goods traditionally sold within retail warehouses (i.e. DIY, furniture, carpets and large electrical goods), can increase the level of comparison expenditure retained in the District, the following retail warehouse floorspace could be supported in the Ringwood/ Fordingbridge area: 1,000 sq m gross by 2012 or 1,700 sq m gross by 2018.

7.11 Any major comparison retail proposals outside the main town centres, which are either outside village and local centres or development, which is out-of-scale in relation to the role of the village and local centre, will be required to comply with the sequential approach to site selection, and the applicant will also need to demonstrate the proposal will not have an unacceptable impact on existing centres.

Commercial Leisure Development

7.12 The provision of leisure and entertainment facilities within the District is relatively limited. The District does not offer major commercial leisure uses, such as a multiplex cinema, ten-pin bowling or bingo halls. The canvas of leisure operators identified no interest from operators to develop major facilities in the District.

7.13 However, in **theoretical** terms there may be potential in the future to provide:

- small (up to 3 screen) cinema in the central/southern area of the District;
- small /medium size health and fitness clubs;
- small bingo hall; and
- small/medium nightclubs.

7.14 The general capacity for Class A3 to A5 (food and drink) floorspace within the District's town centres is as follows:

- 2005 to 2012 - 900 to 1,300 sq m gross
- 2005 to 2018 - 1,800 to 2,600 sq m gross

7.15 Ringwood/Fordingbridge could provide between 200 to 300 sq m gross by 2012, or 400 to 600 sq m gross by 2018.

7.16 Town centre developments where appropriate should provide a mix of uses including Class A1 retail and A3 to A5 uses in order to meet the above floorspace projections.

Opportunities in Ringwood

7.17 The need and capacity for additional retail, leisure and business uses, particularly in the short to medium term (over the next 5 years), will need to be considered within the context of available opportunities. The ability of Ringwood town centre to accommodate some or all of this potential has been addressed. Potential sites and opportunities to accommodate future growth within and adjacent to Ringwood town centre have been considered. We have considered opportunities that could deliver a reasonable amount of additional floorspace (i.e. 500 sq m or over). This assessment has been based on:

- discussions with Council officers to review potential development sites and emerging proposals; and
- NLP's own street survey in the centres to identify possible areas suitable for redevelopment, refurbishment or expansion.

7.18 Each option identified has been assessed in terms of its suitability for different forms of retail/leisure/business uses. The assessment of potential sites has considered a number of issues, including:

- the PPS6 sequential approach to site selection, including linkages with the town centre and primary retail areas;
- the capacity of the site to accommodate new floorspace and the type of town centre use suitable on the site;
- the availability of sites for development within a 5 year period, or in the longer term;
- an initial view of commercial viability and development constraints;
- land ownership and land assembly difficulties;
- retail/leisure/business operator demand for space within the centre;
- accessibility (particularly by public transport);
- the regeneration benefits of development;
- other preferred uses for the site (such as housing or community uses); and
- service arrangements and potential traffic congestion problems.

7.19 The review of potential opportunity sites in Ringwood town centre has identified a number of opportunities. These sites have been identified and evaluated, and have been assessed against the following factors:

- existing land uses and availability, categorised as follows:

  - short term - potential to be completed by 2009;
  - medium term - likely to be completed between 2009 and 2012;
  - long term - likely to be completed after 2012;

- commercial potential for retail/leisure development and the most likely form of development, categorised as follows:

  - prime site - likely to attract a developer and business occupiers;
  - secondary site – which may generate limited demand or only demand for a specific kind of use.

- potential scope to accommodate additional retail/leisure floorspace (net increase), categorised as follows:

  - small scale - under 1,000 sq m gross floorspace;
  - medium scale – 1,000 to 2,500 sq m gross floorspace;
  - large scale - over 2,500 sq m gross floorspace;

- potential development constraints; and
- possible alternative uses.

7.20 The overall development prospects of each opportunity, taking on board all of the factors listed above, has been categorised as follows:

- *Good* - development sites that have good prospects for providing additional retail/leisure floorspace, and should be considered for implementation in the short to medium term;
- *Reasonable* - development sites which are well located and may provide potential for additional floorspace, although obstacles to development will need to be overcome, but implementation may only be achieved in the long term; and
- *Poor* - development sites that may be unattractive or unsuitable for retail or leisure development where their delivery is very uncertain.

7.21 This overall rating is based on an initial evaluation for each site. The level of analysis undertaken at this stage is limited, i.e. detailed appraisals of development constraints, land ownership and potential development costs have not been undertaken. More detailed examinations of each site will need to be undertaken before sites can be brought forward for development or ruled out as viable options. The evaluations undertaken for each opportunity are not detailed planning appraisals and they do not imply that planning permission should be granted or refused for retail/leisure development on any site. However, the evaluation is expected to identify potentially suitable development opportunities that may be worthy of further consideration by the

Council. This evaluation provides a framework within which the Council can consider the implementation of a development strategy for Ringwood.

Evaluation of Potential Development Sites

7.22 Each opportunity site identified has been evaluated based on the factors listed earlier in this section. An assessment of each site is provided in Appendix C, and is summarised in Table 7.1 below.

Table 7.1: Ringwood Site Evaluation Summary

Site	Potential Scale Retail/Leisure Development	Potential Availability	Overall Development Potential
R1 – Land at Furlong car park	Medium/Large	Medium/Long term	Good
R2 – 29/33 Southampton Road	Small	Medium term	Poor
R3 – Bus Depot	Small	Medium/Long term	Reasonable
R4 – Land between Furlong Centre and former cinema	Medium	Medium term	Good
R5 – Carvers Industrial Est.	Large	Medium/Long term	Reasonable/Poor

7.23 Within the Ringwood town centre two main opportunities have been identified that have good or reasonable potential to deliver additional retail/leisure floorspace within the short to medium term (by 2012). Either site could come forward before 2012.

7.24 There are emerging proposals to redevelop the former cinema and the Furlong Centre servicing area (Site R4). These proposals could accommodate about 2,000 sq m gross. The comparison retail floorspace projections suggest that up to 2,700 sq m gross of comparison floorspace could be provided within Ringwood by 2012, along with a further 300 sq m gross of Class A3/A4/A5 (3,000 sq m gross in total).

7.25 Alternatively if major development was implemented on the Furlong Car Park (Site R1) the proposals could also meet the projected floorspace requirement up to and beyond 2012. If both site R1 and site R4 were implemented then there is likely to be a significant over-provision of floorspace by 2012 (up to 4,000 sq m gross over the 2012 projection). Therefore, the cumulative effects of both proposals would need to be carefully considered, if both developments are likely to be implemented before 2012. It may be necessary to phased some development after 2012.

7.26 Based on current projections, by 2018 there could be scope for up to 4,400 sq m gross of high street comparison shop floorspace, and further 600 sq m gross of Class A3/A4/A5 (5,000 sq m gross in total). Therefore, in the longer term there is scope to support development on both site R1 and site R4.

7.27 The Furlong Car Park site could accommodate some large format units of say 500 to 2,000 sq m gross, subject to design and scale issues, which could be suitable for retail or D2 leisure. Therefore, the site could accommodate the projected scope for large format retail units (1,000 sq m gross up to 2012 or 1,700 sq m gross up to 2018), in addition to the scope for smaller high street type comparison shops and Class A3 to A5 uses between 2012 and 2018.

7.28 Given the lack of development opportunities within the primary shopping area, it is necessary to safeguard future opportunities and existing retail premises. It is also necessary to safeguard opportunities to extend existing premises.

Ringwood Town Centre Boundaries and Retail Frontages

7.29 PPS6 indicates that local authorities should define the boundary of town centres. It states that for purposes of the policy statement, the "centre" for a retail development constitutes the primary shopping area. For all other main town centre uses the "centre" should be regarded as the area embraced by the town centre boundary. The extent of the town centre should be defined on the proposals map.

7.30 PPS6 states that the Primary Shopping Areas should be the defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, and therefore the town centre may not extend beyond the primary shopping area. Primary frontages are likely to include a high proportion of retail uses. Secondary frontages provide greater opportunity for a diversity of uses.

7.31 Within the context of this PPS6 guidance, we believe that the town centre boundary of Ringwood as currently identified in the Local Plan is perhaps too widely drawn. For example, the boundary includes a significant residential area to the south and south east of the High Street and the Carvers Industrial Estate to the east.

7.32 We believe the boundary to the west and north west of the centre has been correctly drawn, and should continue to include the main town centre car parks. However, the Council should consider excluding the following areas:

- residential and non-commercial uses north of Bickerley Road e.g. Kings Arms Lane, Kingsbury's Lane, Lyne's Lane. The boundary should only include the curtilage of commercial properties fronting on to West Street, the Market Place and Christchurch Road; and

- the Carvers Industrial Estates.

7.33 It will also be necessary to continue to designate a separate Primary Shopping Area and Secondary Frontages. The area as designated as the Primary Shopping Area within the Local Plan is the main retail focus within the centre and has a predominance of Class A1 retail use, which is consistent with PPS6. Within this area the retail role of Ringwood should continue to be protected.