



Nathaniel Lichfield and Partners

Planning Design Economics

NEW FOREST DISTRICT COUNCIL

**LYMINGTON TOWN CENTRE
STRATEGY STUDY**

CL10387/PW/SPe/SPa

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Nathaniel Lichfield & Partners Ltd

14 Regent's Wharf
All Saints Street
London N1 9RL

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

Offices also in:
Cardiff
Manchester
Newcastle upon Tyne

7.0 CONCLUSIONS AND RECOMMENDATIONS

Lymington's Strengths and Weaknesses

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

Strengths

- Lymington is an attractive market town with a pleasant streetscape and many attractive period buildings.
- Lymington has a good provision of food stores suitable for both bulk and top-up shopping. The centre has two reasonable sized supermarkets on the High Street, Tesco Metro and Waitrose. There is also a large Morrisons store to the west of the centre which attracts customers from a wide area.
- In terms of comparison (non-food shops) the centre has a reasonable range of outlets, including a reasonably good selection of multiples, although the choice in some categories is limited. The centre has some high quality outlets including Benetton, Jaegar, Clarkes, Edinburgh Woollen Mill and Country Casuals, and a reasonable choice of independent and speciality shops.
- The vacancy rate within the centre is relatively low compared with the national average, which suggests the demand from business occupiers is strong compared with the supply of premises.
- The centre provides a good range of non-retail service uses with many of the national high street banks represented. The centre has an active evening economy with visitors using restaurants, bars and public houses.
- There is good quality signage in most parts of the centre, although more signage would improve linkages between the Morrisons superstore and the high street.
- There is ample provision of litter bins throughout most of the centre and as a consequence the pavements are relatively free of litter.
- The centre has a relatively affluent and loyal customer base.
- Public transport access to the centre is good with high levels of satisfaction amongst visitors and business occupiers.

Weaknesses

- Lymington is located within both the Bournemouth and Southampton catchment areas. Therefore, local residents also choose to shop within Southampton and Bournemouth, particularly for comparison shopping and major leisure activities.
- With the exception of bars and restaurants, Lymington has a limited provision of leisure and entertainment facilities for a centre of its size.
- The pedestrian links between the High Street and the Quay could be improved.

- Although there is no evidence to suggest car parking provision is deficient in Lymington, the town appears to have the highest level of dissatisfaction amongst visitors and business occupiers out of the four main centres in the New Forest District. Occupiers were particularly critical of car parking provision.
- Lymington is a long linear centre, which makes it difficult for pedestrians to explore all parts of the centre during their visit. Along the High Street there are only a few pedestrian crossings, which also hinders pedestrian movement around the centre.
- A relatively high number of the businesses in Lymington stated that a factor constraining their trading performance was high overheads/rents.
- The street lighting provision in the centre is basic in style and there is limited provision.
- There is limited landscaping and street furniture provision within Lymington town centre.

Lymington's Future Role

- 7.2 The shopping centre hierarchy is clearly 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. Lymington has a similar amount of comparison retail floorspace compared with Ringwood, New Milton and Totton, but has the highest number of comparison shops and a relatively good selection of multiple retailers, compared with Totton and New Milton and Ringwood.
- 7.3 Lymington is the main centre in the south of the District, along with New Milton, and has an important role. It should continue to be a main focus for retail and leisure development. However, the centre falls within the catchment area of both Bournemouth and Southampton. Lymington cannot be expected to compete on level terms with large regional/sub-regional centres, particularly in terms of higher order comparison shopping and major leisure activities and the development strategy must reflect this.
- 7.4 Lymington should be maintained and enhanced as a town centre, and should continue to complement Bournemouth and Southampton by providing for bulk convenience food shopping and a reasonable range and choice of comparison shopping facilities and other services. It should serve Lymington and the surrounding catchment area, including some of the needs of nearby smaller towns e.g. Brockenhurst, Milford on Sea and Sway. The centre should function as one of the two main comparison shopping destination in the south of the District, alongside New Milton, and should also be the main destination for leisure, entertainment and cultural

activities that serve Lymington's residents. In addition Lymington has an important role in serving visitors and tourists.

Meeting Shopping and Leisure Needs in Lymington

- 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 Lymington. 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 convenience floorspace. Therefore, Lymington is within the identified area of deficiency. The floorspace projection for the central/southern part of the District (i.e. Lymington, New Milton, Brockenhurst and Lyndhurst) is about 1,800 sq m net up to 2018. Surplus expenditure is unlikely to support a new food superstore in this area, but could be sufficient to support smaller stores or extensions to existing stores.

Comparison Development

- 7.7 The development strategy for Lymington should seek to maintain the centres' current position in the shopping hierarchy, and where appropriate improve the centre's existing market share of expenditure. In order to maintain or enhance Lymington's existing position it will be necessary to improve comparison shopping facilities.
- 7.8 The quantitative capacity analysis indicates that, based on existing shopping patterns as a baseline scenario, there could be scope for about 4,400 sq m gross of comparison floorspace within the Lymington/New Milton/Brockenhurst/Lyndhurst area up to 2012, or 8,500 sq m gross up to 2018. Based on the existing distribution of comparison floorspace, one might expect Lymington to accommodate about half of this floorspace projection if suitable sites are available (2,200 sq m up to 2012 or 4,200 sq m up to 2018).

- 7.9 A limited proportion of this need for new comparison floorspace can be accommodated in existing vacant floorspace in town centres, because the vacancy rates are relatively low. Therefore, other opportunities need to be identified to accommodate need at least up to 2012, i.e. at least 2,200 sq m gross in Lymington.
- 7.10 Subject to the availability of suitable town centre development opportunities, it may be possible for Lymington and other towns in the central/southern part of the District to improve their market share of comparison expenditure. If market shares can be improved then 5,700 sq m gross could be provided by 2012 or 9,400 sq m gross by 2018, or about 2,800 sq m gross and 4,700 sq m gross in Lymington. Given uncertainties relating to expenditure growth and internet sales, these floorspace projections should be viewed as maximum estimates.
- 7.11 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. 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 Lymington/New Milton/Brockenhurst/Lyndhurst area: 2,200 sq m gross by 2012 or 3,500 sq m gross by 2018.
- 7.12 Any major comparison retail proposals outside the main town centres, which are either outside village and local centres or development that 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

- 7.13 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 demand for major facilities in the District.
- 7.14 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.

7.15 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

7.16 Lymington/New Milton/Brockenhurst/Lyndhurst area could provide between 450 to 650 sq m gross by 2012, or 850 to 1,300 sq m gross by 2018. Again, one might expect Lymington to accommodate about half of this floorspace requirement.

7.17 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 Lymington

7.18 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 Lymington 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 Lymington 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). There may be other opportunities to extend existing premises, which have not been included in this analysis. The assessment of sites has been based:

- 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.

7.19 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.

7.20 The review of potential opportunity sites in Lymington 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.

7.21 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.

7.22 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 Lymington.

Evaluation of Potential Development Sites

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

Table 7.1: Lymington Site Evaluation Summary

Site	Potential Scale Retail/Leisure Development	Potential Availability	Overall Development Potential
L1 – Wilts & Dorset Bus Station	Small	Medium/Long term	Good/Reasonable
L2 – The Post Office	Medium	Medium/Long term	Good/Reasonable
L3 – No. 37-39 St Thomas Street	Small	Short term	Good
L4 – Morrison Food Store	Medium	Short to Medium term	Reasonable
L5 – High Street/New Street	Small	Short to Medium	Reasonable/Poor
L6 – Furniture Repository	Small	Medium term	Reasonable
L7 – Council Offices	Large	Medium to Long	Reasonable
L8 – Bridge Road	Large	Medium to Long term	Reasonable

7.24 Three sites have a 'good' or 'good/reasonable' overall development rating, one of which is very small scale and already has planning permission. These three opportunities (37-39 St Thomas Street, / Wilts and Dorset Bus Station/ The Post

Office) could accommodate up to about 2,400 sq m gross of additional retail or Class A3/A4/A5 floorspace. As indicated earlier there is scope for at least 2,200 sq m gross of comparison floorspace by 2012 within the Lymington area, plus at least 300 sq m gross of Class A3/A4/A5 floorspace (2,500 sq m gross in total). Therefore, if implemented these sites could meet most of the projected floorspace capacity up to 2012.

- 7.25 As indicated above, based on existing shares, Lymington might be expected to accommodate at about half new retail and leisure floorspace needed within the Lymington/New Milton/Brockenhurst/Lyndhurst area of the District. With about a third accommodated in New Milton and the remainder (not more than 20% in Brockenhurst and Lyndhurst. The above opportunities, if delivered, could accommodate Lymington share of new floorspace up to and beyond 2012.
- 7.26 An extension to the Morrison food store could provide up to 1,500 sq m gross of either comparison or convenience retail floorspace.
- 7.27 In terms of large format units, such as retail warehouses, major leisure uses or food stores two peripheral sites have been identified. The Council offices on Avenue Road or employment uses on the junction of Bridge Road and Gosport Street could, if available for development accommodate large format units, either retail warehouses or a food store.
- 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.

Lymington 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 opportunities for a diversity of uses.

- 7.31 Within the context of this PPS6 guidance, we believe that the town centre boundary of Lymington could be more tightly draw around town centre uses along the High Street on the north side. The town centre boundary to the north of the High Street includes residential areas and public open space, for example residential uses along New Street.
- 7.32 It will also be necessary to continue to designate a separate Primary Shopping Area within this town centre boundary. The Primary Shopping Area as designated 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 Lymington should continue to be protected.