North Wiltshire District Council

CHIPPENHAM RETAIL & COMMERCIAL HEALTH CHECK REPORT

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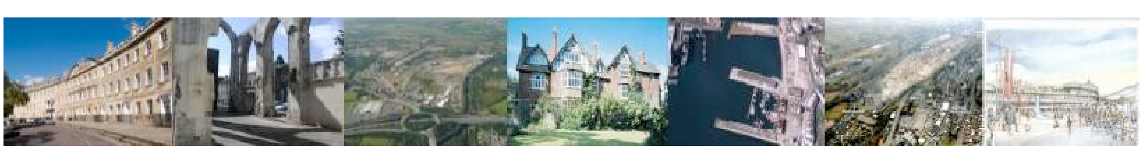

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EXECUTIVE SUMMARY

Following an instruction from North Wiltshire District Council and the Chippenham Vision Group, Savills have undertaken an analysis of the current retail provision in Chippenham Town Centre.

Our analysis of the available demographic information[1] suggests that whilst the shopping catchment area is a relatively affluent population comprising predominantly young families, the shopping population comprises only a third of the potential population within the catchment area. In particular, comparison shopping rates are low, although convenience shopping rates are greater.

The retail area that comprises the town centre and Hathaway Retail Park totals approximately 67,800 sq m, of which there are currently 29 vacant units totalling c. 6,500 sq m. In the current economic climate, this is relatively low, and is an encouraging measure of Chippenham's retailing sustainability. This is confirmed by the fact that Chippenham out-performs its most direct competitors, Trowbridge and Devizes, in terms of rents and yields, however, it performs less well than Cirencester.

In order to attract a larger comparison goods shopping population, one of the requirements is for additional retail space, in particular, larger sized units. National retailers that have requirements for retail space in Chippenham include Debenhams, Monsoon Accessories, Phase 8, Primark and TK Maxx.

We have identified a number of sites that offer the scope for development of additional retail units (in addition to the Bath Road Car Park/Bridge Centre), the most promising of which are the Borough Parade Car Parks and Superdrug.

In addition to the expansion of the retail provision, we feel that an important element of increasing the attractiveness of Chippenham town centre to potential shoppers is to enhance the shopping environment through a face lift and branding exercise, and the appointment of a Town Centre Manager.

[1] Property Market Analysis (PMA) PROMIS Retail Report for Chippenham (February 2009)

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CHIPPENHAM RETAIL & COMMERCIAL HEALTH CHECK REPORT

1. INTRODUCTION

Savills have been instructed by North Wiltshire District Council and the Chippenham Vision Group to undertake a Retail and Commercial Health Check relating to the town centre.

Our report comprises the following:

- We have considered the location and demographics of Chippenham and its surrounding area and how these may influence shopping patterns. We have also commented upon national retail trends.
- We have carried out an analysis of the existing town centre retail portfolio, including the property portfolio, the mix of retailers, the amount of retail floor space, current availability and recent movements, and we have provided an analysis of current retail rents.
- We have identified retailers who have expressed a requirement for retail space in the town centre and we have conducted an analysis of their likely requirements in terms of location and unit size. We have also identified possible development sites that could provide additional retail floor space in the short, medium and long term.
- We have undertaken a comparison of the retail provision in Chippenham town centre with a number of nearby shopping locations, and we have conducted research into a number of initiatives that have produced positive results for the town centre in similar sized market towns. In addition, we have sought local views from a number of retailers, stakeholders and shoppers.
- In particular, we have drawn upon the findings of the North Wiltshire Retails Needs Assessment Study report produced in September 2007 by Roger Tym & Partners ('The Tym Report'), which assessed the retail need in the District in the period up to 2026. The report comprises predominantly quantitative data, which we have used and, where appropriate, updated.

- In our conclusions, we have used both sources of data in order to draw our conclusions and provide our opinions as to the current state of the town, its strengths and weaknesses, constraints and opportunities. We have also commented on how we consider the current retail offering in the town centre can be strengthened and enhanced, and we have provided a number of recommendations regarding the quality of the shopping environment and the expansion of the existing retail provision.

2. CHIPPENHAM TOWN CENTRE

2.1 LOCATION

Chippenham is a sizeable market town in Wiltshire, situated approximately 21km to the north east of Bath, 45km east of Bristol and 33km south west of Swindon. Chippenham town centre is accessible from a number of main roads: the A4 and the A420 provide access from the south west and south east, and north east respectively, while the A305 provides access to Junction 17 of the M4, which lies approximately 7km to the north.

A location plan showing the extent of town centre retail in Chippenham is attached at **Appendix 1**. This is the area we have focussed on for the purpose of this report.

2.2 DEMOGRAPHICS

The Property Market Analysis (PMA) PROMIS Retail Report for Chippenham (February 2009) describes the general demographics of Chippenham as follows:

TOTAL POPULATION AND SIZE OF SHOPPING POPULATION

The total population within the defined catchment area[2] is 93,000, which is above average for the Small Towns, and the estimated shopping population[3] is 31,000, which is around the average for the Small Towns. This indicates an underperformance in terms of the potential shopping population. However, retail spending levels are above the PROMIS average, but the volume of comparison shopping is significantly below the PROMIS average, indicating that the majority of spending is on non-comparison goods.

[2] Defined as those postal sectors where the proportion of people who use the town as their main non food shopping destination exceeds 15% (CBRE National Survey of Local Shopping Patterns).

[3] Defined as the estimate of the number of people who regard the town as their main shopping destination (CBRE shopping population).

AGE PROFILE & STATUS

In terms of age profile, there are high proportions of adults aged 25-44 and children aged 0-14, suggesting a high proportion of young families. Other age groups are under-represented. The proportion of the population in the most affluent AB social group is significantly above average; while the least affluent groups are significantly below average. This is supported by the fact that employment levels and car ownership are above average, and the 2001 census showed that 74% are home owner-occupiers, which is above average.

COMPARISON SHOPPING VS. CONVENIENCE SHOPPING

The Tym Report estimated that the turnover of comparison goods shopping in Chippenham Town Centre[4] in 2007 was £117.6M (in 2004 prices) and that the main leakage destinations for comparison goods shopping were Swindon and Bath. The following table shows the percentages of comparison goods shopping that residents within the defined zones of the study catchment area carry out in Chippenham Town Centre:

Residents within defined zone[5]	Percentage of comparison goods shopping carried out in Chippenham
Chippenham North	19.4%
Chippenham Urban Area	38.0%
Malmesbury	11.2%
Corsham	22.5%
Calne	28.4%

Source: Tym Report, 2007

The Tym Report concluded that the retention rate for shopping for clothes, shoes and specialist comparison goods is particularly low, and that the highest retention rate for comparison goods shopping is for DIY and decorating goods.

This contrasts with convenience goods shopping, which the Tym Report concluded was highly localised with a low percentage of short distance leakage. The following table shows

[4] Core town centre retail area excluding Hathaway Retail Park
[5] Residential zones as defined in the Tym Report 2007

the percentages of convenience goods shopping that residents within the defined zones of the study catchment area carry out in Chippenham supermarkets:

Residents within defined zone[6]	Percentage of convenience goods shopping carried out in Chippenham supermarkets
Chippenham North	54.9%
Chippenham Urban Area	82.9%
Corsham	48.3%
Calne	9.6%

Source: Tym Report, 2007

CONCLUSIONS

The demographic profile indicates a relatively affluent population comprising predominantly young families, who are likely to own cars that they may choose to use to travel to alternative shopping destinations, particularly for comparison goods shopping. This supports the concern of North Wiltshire District Council that many of the population go elsewhere to do their shopping.

[6] Residential zones as defined in the Tym Report 2007

3. NATIONAL RETAIL MARKET OVERVIEW

In January 2009, Savills Commercial Research published its Shopping Centre and High Street Bulletin for the fourth quarter of 2008. It summarised national trends and forecast its predictions for 2009.

In summary, the best retailers, such as the John Lewis Partnership and Sainsburys, are continuing to generate sales growth, however, the worst retailers are disappearing completely, as we have seen with the likes of Woolworths. Those in between are likely to experience a decline in sales and decreased margins, with cash flow providing the main area of concern to businesses.

Large scale diversified shopping locations are predicted to perform better than their local counterparts, while uninspiring shopping locations are predicted to be under serious structural threat and will probably see vacancy rates climb into double figures. Such locations are predicted to experience a rental decline of up to 25%.

The High Street investment market has experienced a similar rollercoaster. For those already in the market, values have fallen, the availability of debt has all but disappeared, and the occupational market is deeply distressed. For those wishing to enter the market, at the end of 2008 there was a lack of good quality, fairly priced stock, and many were waiting to see how retailers performed over Christmas. In addition, retail decline in the High Street is a major worry, and over renting is of particular concern. Along with falling values, yields are at their highest for a generation, reflecting the associated risks of investment in the retail sector. However, as High Street investment now begins to appear more attractive, quality of income is the highest priority to investors and those willing to take the increased risks are keen to incorporate safety measures to ensure the continuity of their investment, ie. protect the rental income.

4. EXISTING RETAIL PORTFOLIO

4.1 OVERVIEW

Chippenham town centre's prime retail area is focussed around the pedestrianised section of the High Street, where the majority of shops are contained within converted period buildings.

Two shopping centres, Borough Parade and Emery Gate, are located to the west and east, respectively, of the High Street, and provide additional prime retail space. Borough Parade provides the newest shopping centre opened, in October 1996, and comprises c. 7,700 sq m (83,000 sq ft) of retail floor space across 30 retail units. Retailers include New Look and Argos.

Emery Gate is a covered centre and was opened in July 1986. It comprises c. 9,300 sq m (100,000 sq ft) of retail floor space across 27 retail units. The scheme is anchored by a new Tesco Metro store with other retailers including Peacocks, Bon Marche, Currys and Dorothy Perkins

Further, secondary, retail areas are located to the north and south of the High Street, along The Bridge, New Road and Station Hill to the north, and Market Place, The Shambles, The Butts and The Causeway, and Timber Street to the south. The majority of retail properties in these locations are within converted period buildings.

The retail area to the north of the High street is linked via a bridge that crosses the River Avon. Although this creates a degree of separation between the retail areas, the footfall is relatively high and there appears to be a degree of synergy between the two areas. This is aided by the presence of the Bath Road car park on the northern side of the river.

In addition to the town centre provision there are two large edge of town supermarkets (Sainsburys and Morrisons) and also Hathaway Retail Park, which comprises a total of c. 7,600 sq m (82,000 sq ft) secondary retail floor space and whose occupiers include Dreams, Halfords and Homebase.

4.2 MIX OF RETAILERS

An analysis of the Chippenham town centre retail area reveals a total floor space of approximately 67,800 sq m (this includes the Hathaway Retail Park). The latest Experien GOAD Plans attached at **Appendix 2** show the current mix of retailers and vacant units in the town centre area and Hathaway Retail Park.

An analysis of a selection of town centre retailers reveals the following breakdown of shop types:

Retailers	Prime	Secondary	Total
National operators[1]	31	13[2]	44
Estate agents	0	11	11
Banks & building societies	6	3	9
Charity shops	1	6	7
Mobile phone shops	6	0	6
Travel agents	4	1	5
Betting shops	0	4	4
Clothes shops	12	1	13
Hairdressers & beauty salons	1	16	17
Florists	1	3	4
Jewellers	2	1	3
Furniture, carpets & general household goods	1	19	20
Camping/outdoor	1	1	2
Stationers & printing/photocopying	2	3	5
A3 use:-			
Takeaways	0	15	15
Cafes, coffee shops & restaurants	6	17	23
Public houses & hotels	0	8	8

[1] excluding national mobile phone companies, banks & building societies, travel agents, estate agents, and coffee shops, which are categorised separately, and including Tesco (Metro & Express), Bon Marche, Dorothy Perkins, Clarks Shoes, Currys, Clinton Cards, Peacocks, Timpson, The Fragrance Shop, Giles Sports, Julian Graves, Stead & Simpson, Iceland, Burton, Millets, Boots (the Chemist & Optician), The Body Shop, Claires Accessories, Evans, Specsavers, New Look, Robert Dyas, Waterstones, Argos, Thorntons, Birthdays, W H Smith, Superdrug, Wilkinsons, F Hinds, New Look, La Senza, Allied Carpets, Blockbuster, Homebase, Laura Ashley, Dreams, Jolleys, Bensons, Halfords, Bathstore.com

[2] includes 9 units on Hathaway Retail Park.

The majority of national high street chains are located in the prime retail area, with the exception of the 9 national retailers located in the Hathaway Retail Park. Noticeably, La Senza and Pizza Express are located in secondary areas, while one of the prime locations on the High Street is occupied by the British Heart Foundation charity shop.

4.3 RETAIL FLOOR SPACE

A summary of the range of floor space is shown in the following table:

Size range (sq ft)	Count	Total retail area (sq ft)	Total retail area (sq m)
0 – 1,000	140	94,600	8,788
1,001 – 2,000	87	131,000	12,170
2,001 – 3,000	35	86,200	8,008
3,001 – 4,000	22	76,400	7,098
4,001 – 5,000	15	67,600	6,280
5,001 – 6,000	9	50,400	4,682
6,001 – 7,000	4	26,200	2,434
7,001 – 8,000	2	15,600	1,449
8,001 – 9,000	4	34,100	3,168
9,001 – 10,000	3	28,500	2,648
10,000+	6[1]	119,400	11,092
TOTAL:	**327**	**730,000**	**67,817**

Source: Experien GOAD

[1] Wilkinsons, New Look, Tesco Metro, ex-Woolworths, ex-Taylor's Motorcycle store, Homebase (Hathaway Retail Park)

Chippenham town centre and its immediate surrounding area has a total of 327 retail units, which is a high number for a town of this size. The majority of units, almost 70%, are in the size range 0 – 2,000 sq ft (186 sq m), and less than 10% of the retail units available are larger than 5,000 sq ft (465 sq m).

4.4 CURRENT RETAIL AVAILABILITY

The Experien GOAD plans show that there are currently 29 available units, ranging from 18 sq m (200 sq ft) to c. 1,850 sq m (20,000 sq ft) (former Woolworths), of which 13 units are within the core retail area. The retail floor space currently available totals approximately 6,500 sq m.

The available units are identified in red at **Appendix 2**. Whilst the town has been affected by a number of the recent retail administrations including Woolworths, it has by no means been affected as badly as other nearby towns. In fact, we believe that the current level of voids is actually an encouraging measure of the town's retailing sustainability.

4.5 RETAIL RENTS & YIELDS

The Tym Report showed that, in the 10 year period up until 2006, Zone A rents for Retail Property in Chippenham reached £70 ZA. Retail property yields in Chippenham varied from 7.5% to 8.5%, and by 2007 were in the region of 7%.

We have identified on an Experien GOAD plan, attached at **Appendix 3**, the established rental tone[7] for the High Street and the two shopping centres. We have been unable to identify a clear tone for other areas in the town, but these are expected to range from £20 ZA to £40 ZA, although some more tertiary areas of the town will not comply with this method of valuation.

4.6 RECENT MOVEMENTS

Rental levels in Chippenham have grown at a relatively conservative rate over recent years. This is mainly due to the lack of availability of suitably configured premises that would attract an element of competition between interested parties. The advantage of this to retailers is that they may still consider Chippenham to be a relatively affordable centre in comparison to other towns where rents may have grown at a more dramatic rate in the last few years.

[7] The pattern of movement of Zone A Rents within a specified retail area.

5. REQUIREMENTS FOR FUTURE RETAIL PROVISION

The requirements for future retail provision in Chippenham town centre depend on a number of key factors, which include:

- Identified retailer requirements
- Projected population increases
- The ability of the shopping environment to attract a greater shopping population

Each of these factors translates into a direct need for additional retail provision and therefore, the size, location and mix of any additional retail offering must be considered and planned for.

5.1 IDENTIFIED RETAILER REQUIREMENTS

There are a number of national retailers that have identified Chippenham as a town where they should have representation. Whilst it is expected that many of these may not be in a position to progress matters in the current economic climate, it is expected that these requirements will become live again in the future.

These requirements include the following:

Retailer	Size Requirement	Comment
A-Wear	232 sq m plus ancillary	Very recent requirement from Irish retailer.
Card Factory	93 – 139 sq m	
Debenhams Desire	1,858 – 2,323 sq m	
Frankie & Benny's	325 – 465 sq m	Leisure requirement
Game Station	121 – 167 sq m	
Holland & Barratt	Up to 112 sq m	
Monsoon Accessorize	139 – 232 sq m	
Orange	84 – 139 sq m	
Pampurred Pets	232 – 465 sq m	Requirement for edge of town to avoid higher rentals
Phase Eight	Up to 139 sq m	

Poundland	372 – 557 sq m
Primark	Up to 3,700 sq m
TJ Hughes	2,323 sq m plus
TK Maxx	Circa 3,716 sq m
Wheels Of Sport	93 – 232 sq m

5.2 PROJECTED POPULATION INCREASES

The Tym Report used the ONS 2004 based population forecasts to predict that the possible retail need for the North Wiltshire town centres up to 2026 is likely to be in the order of between 37,900 and 55,100 sq m. (comparison goods: 32,200 and 45,800 sq m; convenience goods: 5,700 and 9,300 sq m.).

The latest version of the RSS (Draft Revised RSS for the South West incorporating the Secretary of State's Proposed Changes, July 2008), requires the provision of at least 5,500 dwellings, which will further boost the population. However, without carrying out a detailed research and demographic study (which we have agreed falls outside of the scope of this report) it is not possible to comment in any detail on how this will directly increase the need for additional retail floor space.

The priority for both the short and long term is to encourage the local population to use Chippenham town centre as their preferred shopping destination, and to be able to provide retail units of sufficient size and configuration to accommodate those larger retailers who have indicated a requirement.

5.3 ABILITY TO ATTRACT A GREATER SHOPPING POPULATION

The ability to attract a greater shopping population depends upon the ability to provide a greater variety of shops, and a greater number of larger shops. It also depends upon the attractiveness of the town centre shopping environment, and its ability to appeal to, and draw in, potential shoppers. We are of the opinion that this a key element to invigorating the appeal of the town centre as a shopping centre, and later in this report we have made recommendations regarding how we think it can be achieved.

5.4 LIKELY MAKE-UP, MIX AND LOCATION OF UNITS TO SATISFY PREDICTED MARKET NEED

We feel it is important that any additional retail provision is provided to enhance the current retail offer. As such, this should be focused within the core retailing area of High Street, Market Place and the two existing shopping centres. The aim of this would be to create a more focused core retailing area and to possibly create a retail circuit for shoppers rather than the current disjointed layout.

The exception to this would be the future development of the Bath Road site which lends itself to development due to its location and size. However, it is imperative that for any proposed design of scheme in this location there is a strong link in the direction of High Street.

We do not feel that it is appropriate to identify a specific list of unit sizes and quantities at this stage. We have identified above the current requirements for the town and whilst we would not suggest that all of these be necessarily accommodated within the core retail location it does provide a useful guide. More specific planning can be carried out once a development site has been identified and timescales discussed.

However, it is clear that there will need to be provision for a number of much larger units to accommodate retailers such as Debenhams, Marks & Spencer, Primark, TK Maxx and TJ Hughes.

6. POSSIBLE DEVELOPMENT SITES FOR RETAIL EXPANSION

The Tym Report appraised the following Chippenham town centre and edge of town centre sites for their suitability to provide additional retail floor space:

Site	Location	Gross Site Area, sq m	Net Retail Area, sq m
Bath Road Car Park/Bridge Centre	Town centre	9,912	7,930
Borough Road Car Parks	Town centre	5,203	4,162
Bus Station, Timber Street	Edge of town centre	2,128	1,702
Library, Timber Street	Edge of town centre	511	409
Post Office Sorting Depot, Station Hill & former Taylor Motorcycle Store	Edge of town centre	2,672	2,138
Superdrug Store, High Street	Town centre	479	383
Town centre sites total:		**20,426**	**16,724**

Source: Tym Report, 2007

A plan of the sites in attached at **Appendix 4**.

Having visited the sites, we are in agreement with the findings of the Tym Report that the town centre and edge of town centre sites identified could potentially be suitable sites for additional retail space. This would, however, be subject to availability, planning, etc.

The Bath Road Car Park / Bridge Centre site is being marketed currently by NWDC and WCC as a retail/mixed use development site and a shortlist of developers has been identified. This site forms a natural extension to the High Street and offers the opportunity for a potential supermarket along with a range of other retail units. We think this is a good site for providing some larger sized stores which are currently limited in supply in the central area.

The Borough Road Car Parks offer an opportunity to infill the areas at the rear of the existing Borough Parade Shopping Centre with additional retail space. The Tym Report states that NWDC owns the land. In our opinion, this option offers the best opportunity for retail expansion.

The Bus Station and Library in Timber Street also offer opportunities to provide new retail space. Although slightly remote from the High Street, their locations are sufficiently close to the Market Place and The Causeway to offer the opportunity to expand the existing retail area the south of the town centre. The Tym Report states that the Bus Station is part owned by NWDC and First Bus, and the Library is owned by Wiltshire County Council.

The Post Office Sorting Deport and former Taylor Motorcycle Store on Station Hill offer an opportunity to expand the existing retail area to the north of the town centre. Both sites are currently for sale. Their purchase and redevelopment could provide an opportunity to regenerate and invigorate the northern area of the town centre and extend the town centre.

Improvements in the linkage between the two sides of the river would increase the suitability of the edge of town centre sites for retail development.

The Superdrug Store on the High Street offers a good opportunity for redevelopment and expansion of the existing retail space, however, the Tym Report states that it is currently owned by Northern Retail; Properties (General Partner) Limited, which may cause acquisition problems as it's not in Local Authority ownership.

6.1 ADDITIONAL SITES

In addition, we have identified the following sites that could provide an opportunity for further retail development. Some of the sites were also discussed in the Tym Report.

Site	Location	Gross Site Area, sq m	Net Retail Area, sq m
Existing units at 2 - 22 The Bridge	Town centre	1,412	1,130
Iceland store and car park, Market Place	Town centre	1,798	1,438
Masonic Lodge, Emery Gate	Town centre	984	787
Tesco Metro Car Park, Emery Gate	Town centre	2,569	2,055
Westmead Lane Car Park	Edge of town centre	865	692
Liberal Club, Gladstone Road	Edge of town centre	1,111	889

Gladstone Arms, Gladstone Road	Edge of town centre	700	560
Hygrade Foods Site, Westmead Lane	Edge of town centre	12,169	9,735
Railway Station Car Park	Edge of town centre	7,944	6,355
Stronghold Site, Cocklebury Road	Edge of town centre	1,009	807
Total:		**30,561**	**24,448**

Of these sites, ownership issues are likely to give rise to acquisition problems, and although they may provide long term development possibilities, it is unlikely that they will provide a short to medium solution to the requirement for additional retail space. These sites are also shown on the plan attached at **Appendix 4**.

6.2 OTHER DEVELOPMENT OPPORTUNITIES

In the longer term, there is the opportunity for additional redevelopment in the form of existing single/two storey units situated in amongst taller multi-storey units. For example, there are single storey retail units at Timber Street and The Bridge, and two storey units at The Butts that could be redeveloped to the height of the surrounding buildings and provide additional retail floor space. However, as with the sites identified above, ownership issues are likely to give rise to acquisition problems, and although they may provide long term development possibilities, it is unlikely that they will provide a short to medium solution to the requirement for additional retail space.

6.3 SUMMARY

Having considered the above, we believe that the Borough Road Car Parks should be focussed on as this provides an opportunity to centre the retail offering around the core shopping area of the High Street and start to develop a shopping circuit.

7. COMPARISON WITH NEARBY SHOPPING LOCATIONS

Residents in and around Chippenham can choose to shop at a number of alternative shopping centres in the region, the most usual being Swindon, Bath, Bristol, Trowbridge, Devizes and Cirencester.

7.1 BRISTOL & BATH

It would be unrealistic to compare Chippenham with the major regional centres such as Bristol and Bath, however, it is important to acknowledge the potential for greater shopper 'leakage' to these centres following the opening of Cabot Circus and Bath's South Gate Centre (Phase One opens in October 2009). In terms of floor space, rents, quality of retail offering, etc., Chippenham cannot compete with these retail centres, but must be able to offer a viable alternative for a local shopping experience.

As would be expected, the rents in these market towns are considerably lower than in the major regional centres of Bristol and Bath. Yields were also considerably lower in the major regional centres of Bristol and Bath, reflecting a much lower investment risk.

7.2 TROWBRIDGE

Realistically, Chippenham's main retail competitor is the market town of Trowbridge, approximately 14 miles to the south of Chippenham and is broadly similar in size to Chippenham, with 71,350 sq m retail floor space (compared with 67,800 sq m in Chippenham). Both towns offer a convenience shopping destination to the local population.

Average rents are higher in Chippenham. The Tym Report showed that, in the 10 year period up until 2006, Zone A rents for Retail Property in Trowbridge reached £65 ZA, compared with £70 ZA in Chippenham. In the period 2000 – 2006, retail property yields in Trowbridge were consistently higher than Chippenham (7.5% in 2007), reflecting a greater investment risk and indicating that Chippenham is more attractive to investors.

The PROMIS Retail Report for Trowbridge shows that the town benefits from a large catchment population of 149,000[8] (compared with 93,000 for Chippenham), and the estimated shopping population is 59,000[9] (compared with 31,000 for Chippenham). Trowbridge attracts a higher percentage of the catchment population, 39.6%, compared to Chippenham, which attracts 33.3% of the catchment population. The population is less affluent than that of Chippenham, and is generally older.

Trowbridge has a more focussed, or centralised, retail offering that provides a shopper 'circuit' (formed by The Shires shopping centre and Fore Street). Trowbridge currently benefits from a Marks & Spencer Simply Food outlet although this is currently on the market and, as such, will close in the near future.

Moving forward, the town will benefit from the proposed Waterside Leisure development which will provide cinema, bowling, hotel and restaurants, etc.

7.3 DEVIZES

Devizes can also be considered a competing market town and is located approximately 11 miles to the south east of Chippenham. However, it has significantly less retail floor space than Chippenham (approximately 59,000 sq m). As with Trowbridge, the retail offering is centralised and the periphery of the current retail area is anchored by larger space retailers including Marks & Spencer, Tesco, Sainsburys and Boots.

The Tym Report showed that in the period 2000 – 2006, retail property yields in Devizes were consistently higher than Chippenham (7.5% in 2007), reflecting a greater investment risk and indicating that Chippenham is more attractive to investors. No comparison rental figures were given for Devizes.

Comparison demographic figures for Devizes were unavailable.

[8] Defined as those postal sectors where the proportion of people who use the town as their main non food shopping destination exceeds 15% (CBRE National Survey of Local Shopping Patterns).

[9] Defined as the estimate of the number of people who regard the town as their main shopping destination (CBRE shopping population).

7.4 CIRENCESTER

The market town of Cirencester, located approximately 22 miles north of Chippenham, is considered by many to be an attractive shopping destination, attracting a high number of tourists as well as local shoppers. Cirencester has approximately 64,500 sq m of retail floor space, which is just below that of Chippenham.

Rents in Cirencester are similar to Chippenham. The Tym Report showed that, in the 10 year period up until 2006, Zone A rents for Retail Property in Cirencester also reached £70 ZA. In the period 2000 – 2006, retail property yields in Cirencester were slightly lower than Chippenham (6% in 2007), reflecting a slightly lower investment risk and indicating that Cirencester is more attractive investment proposition than Chippenham.

The PROMIS Retail Report for Cirencester shows that the population size within the defined catchment area is 76,000[10], and the estimated shopping population is 30,000[11]. Cirencester attracts a similar, albeit marginally higher percentage of the catchment population, 39.5% (compared to 33.3% in Chippenham).

The town benefits from a very wealthy, generally older, catchment, which is further boosted by tourism and the presence of the Royal Agricultural College. As a result of this, the town has developed an impressive retailer line up which is made up of national operators but also a large number of established local businesses.

7.5 SUMMARY

As a retail centre, Chippenham is performing at a comparable level with Cirencester and is out-performing Trowbridge and Devizes. It is clear that Chippenham faces substantial competition with the local population being faced with a number of very attractive alternatives including locations such as Cirencester, but also regional centres such as Bristol, Bath and Swindon. Whilst it is a general rule that the larger centres provide for comparable shopping

[10] Defined as those postal sectors where the proportion of people who use the town as their main non food shopping destination exceeds 15% (CBRE National Survey of Local Shopping Patterns).
[11] Defined as the estimate of the number of people who regard the town as their main shopping destination (CBRE shopping population).

and smaller market towns provide for convenience shopping this rule shall not been seen as absolute.

8. COMPARISON PROJECTS

In recent years, a number of regeneration projects have been initiated in towns around the country. In particular, a number of market towns have embarked upon initiatives designed to reinvigorate the retail provision of the town.

In November 2000, KPMG studied 17 market towns in the West Midlands in order to assess their vulnerability to future decline (Market Town Regeneration in the West Midlands, November 2000). They concluded that there was a need to reinvigorate retail provision and ensure that the retailers within market towns were not attempting to compete directly with out-of-town retailers, and they recommended a range of initiatives, including:

- encouraging longer opening hours to serve local demand
- improving the quality and scope of the retail offering
- increasing the perception of security within the town centre, using CCTV, increased policing and community safety partnerships
- establishing forums sharing best practice in business
- promoting town centre shopper loyalty schemes
- encouraging links between local farmers and local retailers and promoting local goods
- supporting and encouraging retailers to innovate and respond to changing markets
- limiting the number of charity shops in town centres

The projects discussed below highlight a number of successful initiatives that have contributed to a regeneration and invigoration of the retail provision in market towns.

8.1 CLITHEROE

In 2001, the 'Clitheroe The Future' Partnership was formed by Ribble Valley Borough Council, Clitheroe & District Chamber of Trade & Commerce and Clitheroe Civic Society, and it initiated a Market Town enhancement project to enhance and invigorate the trading structure of the town. Over the lifetime of the Partnership, a number of improvements have been made to the town, costing £70,000. The improvements have included:

- new shop fronts and increase floor space
- new street signs
- a community notice board
- town maps
- additional flower beds

Further information regarding the various market town initiatives introduced is available from www.clitheroethefuture.co.uk.

8.2 SALISBURY

Salisbury City Centre Management Limited (SCCM) have successfully implemented a Café Culture initiative, which they claim has renewed vitality in the city centre. Pavement cafes have been introduced on some of the pedestrianised areas and wide pavements, and have created a relaxed and sociable style of eating and drinking. It also promotes the growing market for good quality coffee and light meals. SCCM has produced clear guidelines for those wishing to apply for a licence, including size and area, means of enclosure, furniture requirements, and the environmental responsibilities of the operators. Further information regarding the initiative is available at www.salisburyccm.co.uk/cafeculture.

8.3 STROUD

Stroud Town Council have initiated a number of successful regeneration activities in the town centre, which have included:

- CCTV
- Christmas lights
- Stroud in Bloom
- Saturday Street Entertainment
- A series of annual festivals, including Food & Drink Festival, Stroudwater Textile Festival etc.
- Public gardens

The Council feels that these events and initiatives draw people into the town and are committed to providing investment for them. Further information is available from www.stroudtown.gov.uk, including the results of their recent town survey, which included a number of comments highlighting the desire for a fully pedestrianised town centre with safe walking surfaces, a greater variety of shops including 'big names', less charity shops and take aways, and clear support for the food festival, farmers markets and Saturday street musicians/entertainment.

8.4 FROME

The Frome Area Regeneration Programme has generated many town improvements since it began in 1996, including the extension and enhancement of the town centre. It attributes the reinvigoration of the town centre to a number of initiatives, including:

- A number of annual events (Frome Festival, Christmas Lights, Medieval Fair, Mendip Food Festival)
- The Towntalk website
- Annual Shopping Guide
- Artwork, signage and maps
- CCTV and lighting improvements

Further information regarding the latest initiatives can be found at www.mendip.gov.uk/Documents/Frome%20ARP%2006.pdf.

8.5 CIRENCESTER

Cirencester Town Council has recently pledged £150,000 towards a renovation of the market place in order to reaffirm its place as the centre of the town. They feel that this is a very important project for the future of Cirencester town centre.

A summary of the proposed scheme is discussed at www.wiltsglosstandard.co.uk/news/4135788.Cirencester_town_council_pledge___150_000_to_Market_Place_scheme.

8.6 SUMMARY OF INITIATIVES

These initiatives demonstrate that a range of activities typically contribute to the improvement of market town retail provision. In addition to any long term retail expansion programmes, short and medium regeneration activities can bring benefits that improve the overall image of the town as a retail centre and in our opinion, should implemented.

9. LOCAL VIEWS

The Tym Report described Chippenham town centre as 'an attractive town centre with a good balance of types of retail… and a good range of retailer representation'. It described the primary retail area of the town as 'focussed on the High Street, which forms an attractive link from the Bridge to Market Place and to the secondary retail areas beyond.' It also concluded that 'public transport accessibility [to the town centre] is good'.

These observations would suggest that Chippenham town centre is a successful retail centre, however, it is the view of North Wiltshire District Council that a number of potential large retailers are unable to find accommodation of suitable size and quality within the town centre, and that because of a lack of large, high quality shops, a high proportion of the population go elsewhere for their shopping. The Council is also concerned at the growing number of empty units, and wish to develop a strategy for increasing the available floor space for larger stores, increase the overall quality of the retail offering in the town centre and attract high quality retailers. The need for additional retail provision in the town centre is given further weight by the requirement for 5,500 new homes in the period 2011 – 2026 specified in the Draft Revised Regional Spatial Strategy for the South West, published in July 2008.

In order to gain insight into local views, we spoke to a number of retailers, stakeholders and representatives from the Chamber of Commerce, and we have included a summary of their views in the following sections.

9.1 RETAILERS

We have spoken to representatives from the following retailers:-

- New Look
- WH Smith
- Argos
- Peacocks / Bon Marche
- Pizza Express

Of the above list the retailers were generally very positive about the town and felt that it was at a comparable level to Trowbridge. A number of those spoken to felt that relatively small improvements made to the aesthetics of the town could pay dividends. Others mentioned that the addition of a Marks & Spencer Simply Food or Waitrose would help to elevate the town and attract a further sector of the local population.

9.2 STAKEHOLDERS

We have spoken to representatives from the current landlords of Emery Gate and Borough Parade. Comments from these two parties were in general terms very positive about the town although some more specific points were as follows:-

- A perceived lack of commitment from the Local Authority thought to be linked to the ongoing transition to Unitary Authority status
- Too many traffic and street signs on High Street
- Lack of coherent retail signage policy
- River frontage should be maximised fully

9.3 CHAMBER OF COMMERCE

We have spoken to a number of members of the Chamber of Commerce, some of whom are local retailers themselves, and their similar views are broadly similar to those of the retailers and stakeholders above.

9.4 SHOPPERS

We spoke to a selection of 10 shoppers of a wide range of ages, the majority of whom said that Chippenham town centre is an occasional shopping destination for them. The majority expressed the opinion that the overall quality of town centre shopping in Chippenham is average, as is the range of shops.

The majority of comments relating to how the quality of town centre shopping could be improved concerned the following:

- the provision of a greater variety of shops
- the provision of larger shops
- renovation of the High Street [for pedestrian use] – remove the road; landscape the area
- more shops for local traders
- less charity shops

10. CONCLUSIONS

A successful retail centre needs a distinguishing feature that differentiates it from its competitors. Chippenham has a number of strengths, including its transport links, its market town architecture and period features, the amount of retail floor space it has as well as opportunities to grow further, and its relatively affluent population.

However, it fails to attract a significant proportion of the population as a comparison goods shopping destination. This is largely due to the fact that it has no department stores and very few stores of significant size, and its general quality of shops is perceived to be poor.

10.1 EXISTING RETAIL PORTFOLIO - CONCLUSIONS

We have conducted a survey of the quality of the retail areas and buildings in the main town centre shopping locations. Our opinions are summarised below.

THE PEDESTRIAN HIGH STREET

The High Street comprises retail units on either side, contained within predominantly non-purpose built period premises. They comprise a mix of national high street chains, with uses including banks and building societies, clothing shops, mobile phone shops and travel agents.

In general, the shop fronts and the building frontages look poorly maintained and in need of repair and for general upkeep and cleansing. The shop fronts and signage are of various designs and it is clear that there has been no co-ordinated approach in trying to adopt a uniform design policy.

The pedestrianised section of the High Street is pedestrianised only in the sense that there are barriers at each end preventing vehicle access when shut. The pavements and road are still in place, as are the double yellow lines and other road markings. There is little sense of being in a shopping precinct. Whilst we acknowledge the need for servicing access, we feel that this area could be improved upon.

The High Street should be the focus of the town centre, and should ideally attract high quality national chains as well as the best local, independent retailers and, where appropriate, cafes and restaurants. It should provide an attractive setting in which to shop, with the addition of quality cafes and restaurants to increase the shopper dwell time. (Parking policy can also support this aspiration.)

Our opinion is that the High Street is not currently meeting these requirements, in terms of the attractiveness of the shops and the pedestrian setting, and that a range of improvements are required in order to raise the overall appeal of this area.

THE SHAMBLES & MARKET PLACE

The Shambles is a pedestrianised area with period buildings either side. The mix of retail units includes betting shops, banks, a charity shop and an estate agent in addition to a hotel and a public house. Similarly, the Market Place comprises some of the oldest and most attractive architecture in Chippenham and its retail units comprise estate agents, hairdresser, tattooist, nail bar and jewellers in addition to employment agencies, and public house/restaurants.

These areas, together with the High Street, form the heart of the town and should form part of the primary retail area. This is in contrast with the secondary nature of the existing occupiers.

Our opinion is that the area is currently being under-utilised and could be further exploited to create an attractive, traditional market town retail setting, offering an interesting mix of independent shops and local produce, and provides an attractive environment for a pavement café culture.

THE BUTTS, THE CAUSEWAY & TIMBER STREET

These areas are characterised by a mix of period and more modern buildings, which are occupied by a mix of retailers, including a convenience store, a number of takeaways and restaurants, various independent retailers, and offices. These areas have a secondary look and feel, and some of the buildings are poorly maintained, which detracts from some of the more attractive architecture.

In our opinion, a range of improvements are required in order to raise the overall appeal of this area.

THE BRIDGE, NEW ROAD & STATION HILL

The Bridge and New Road comprise ground floor shop units in a variety of purpose-built and non-purpose-built premises within a mix of period and more modern buildings. The mix of retail units includes a number of charity shops, cafes, restaurants and takeaways, furniture, carpet and general household good shops, and a number of estate agents. Similar to the High Street, the shop fronts and the building frontages look poorly maintained and in need of repair and general upkeep. The general area has a very secondary look.

In our opinion, a range of improvements are required in order to raise the overall appeal of this area. For example, Numbers 2-22 The Bridge comprises purpose-built, modern retail units that offer, in the long term, a redevelopment option to provide a larger, more attractive retail area in place of the current provision. This block forms a single interest which should assist in future development.

BOROUGH PARADE

Borough Parade shopping centre comprises an open shopping centre accessed from the High Street or its own surface car park. Retailers include New Look, Argos, Evans and SpecSavers. The scheme suffers from having a limited frontage to the High Street and as such, the units in this part of the scheme are small and tend to be occupied by smaller retailers.

EMERY GATE

Emery Gate shopping centre is a covered shopping centre accessed from the High Street or the adjoining multi storey car park. However, it is starting to look worn in areas, and in need of repair.

10.2 ADDITIONAL RETAIL DEVELOPMENT - CONCLUSIONS

In addition to the redevelopment of the Bath Road Car Parks and Bridge Centre, we are of the opinion that the best areas for development in the short term are the Borough Parade Car Parks and the Superdrug store. The Borough Parade Car Parks are Council-owned and would offer a good starting point at which to develop additional retail floor space, including the provision of some larger units.

At the same time, the Superdrug store offers the potential for river frontage development that could incorporate leisure and retail facilities.

We are of the opinion that Chippenham town centre areas offers a good range of potential development sites, which offer medium to long term development opportunities. We are of the opinion that the sites identified for potential development should be explored on the basis of their proximity to the core shopping area, beginning with those closest to the High Street.

10.3 CHIPPENHAM SWOT ANALYSIS

Our research and analysis of the retail provision in Chippenham town centre can be summarised in the following SWOT analysis:

STRENGTHS

- Demographics - size and makeup of population
- Strong retailer line up
- Transport links
- Market town architecture & period features

- Amount of existing retail floor space
- A good number of potential development sites within the town centre

WEAKNESSES

- Lack of "shopping circuit"
- Geography of retail provision - linear
- Limited aesthetic charm
- Lack of well configured units

OPPORTUNITIES

- To increase the percentage of population that shop in Chippenham
- Improve on quality of retail offering
    - National brands
    - Local business
- Increase profile of historic buildings and market town setting
- Incorporate river frontage into commercial offering
- Increase the quality and coherence of the streetscape

THREATS

- Number and quality of competing centres – market towns and cities
- Ease of access to competing centres
- Inaction

11. RECOMMENDATIONS

On the basis of our analysis and conclusions, we have made a number of recommendations relating to the following areas:

- Improvements to the shopping environment
- The appointment of a town centre manager
- Maximising the potential of the river and river frontage
- Expansion of the retail provision
- Provision of larger retail units

11.1 THE SHOPPING ENVIRONMENT

Excluding the two shopping centres, the majority of the buildings occupied by retail units are in need of maintenance, and the shop fronts and shop signs have no conformity. Of particularly poor quality are the buildings on The Bridge, New Road, and Station Hill. The so-called pedestrian High Street is merely a public highway with barriers closed at each end.

In order to raise the quality of the retail offering in Chippenham, we recommend a face lift and branding exercise be carried out, in order to improve the look of the buildings and shop fronts. In Bath, the Council imposes tight restrictions regarding signage and shop front appearance, and we recommend a similar approach for Chippenham, creating the look and feel of a traditional market town. In this way, Chippenham can develop it is own unique selling point, or USP, through an identifiable brand image.

We recommend that a number of the initiatives implemented by other market towns be implemented in Chippenham. For example, even though vehicle access is required to be maintained to the High Street, we recommend that the area is paved and flower beds and seating be provided, and that a café culture be encouraged, again, through tight guidelines and policies.

Additionally, high quality street musicians and street entertainment have proved popular with other market towns, as have local events and attractions such as farmers markets, and we recommend that similar initiatives are considered for Chippenham. To coincide with these, we also recommend that Chippenham Town Council encourages retailers to open for longer shopping hours in order to attract convenience shoppers who may not have access to the town during the working day, and shopper loyalty schemes to encourage town centre shopping.

11.2 APPOINTMENT OF A TOWN CENTRE MANAGER

We feel it would be appropriate to investigate the potential of reintroducing a Town Centre Manager (or similar role). As with other town and city centres, this position would have the responsibility for a complete range of issues ranging from cleansing and maintenance through to leading and monitoring of more substantial projects.

A Town Centre Manager would play an invaluable role as there would be a clear focus on the important factors and also a continuous monitoring function. This has been proven in many other towns and cities.

11.3 MAXIMISING THE POTENTIAL OF THE RIVER & THE BRIDGE

The bridge over the River Avon creates an opportunity to develop leisure facilities along the northern bank of the river, and there is an opportunity to redevelop the existing buildings on each corner of the bridge, which would invigorate the area and would also have the effect of converging the retail areas on the two sides of the bridge.

By attracting leisure operators to invest in this area, it will have an additional effect of attracting the public into the town centre beyond the core hours of '9 to 5', that will further reinvigorate the town centre.

11.4 EXPANSION OF THE RETAIL PROVISION

In addition to the ongoing redevelopment plans for the Bath Road Car Park and Bridge Centre, we recommend that in the short to medium term, potential sites within the core retail area of the High Street, Market Place and The Shambles are developed to increase and improve the existing retail floor space. We recommend that national operators be focussed on the High Street, with niche and local retailers on the Market Place and The Shambles.

The development of core sites such as the Borough Street Car Parks and Superdrug will, over time, have a knock-on effect to the surrounding retail areas such as The Bridge, Timber Street, New Road and Station Hill, which will act as a catalyst for further, longer term, development in these areas on sites such as 2-22 The Bridge, the Bus Station and the Library, the Post Office Sorting Depot and former Taylors Motorcycle Store.

11.5 LARGER RETAIL UNITS

In order to attract larger quality operators such as Debenhams, Marks & Spencer, TK Maxx etc., there needs to be a provision for larger stores. There is currently a very limited provision of such stores within the town and it is also very difficult to combine existing stores to provide the required floor plates. As such, North Wiltshire District Council need to start considering options for the provision of such large space through future development.

12. DELIVERY PLAN

We recommend the following delivery plan:

ACTION 1: Improvement of the shopping environment, implementation of Chippenham Town Centre branding policies, and the appointment of a Town Centre Manager.

ACTION 2: Investment in the development of the river frontage as a leisure area and improvement of links over The Bridge.

ACTION 3: Expansion of the existing retail provision and provision for larger retailers. The redevelopment of the Bath Road Car park/Bridge Centre is underway and will provide a good starting point for the expansion of the retail area of Chippenham town centre. Further to this, we recommend the Borough Parade Car Parks and Superdrug as preliminary development opportunities.