

9.0 CONCLUSIONS AND RECOMMENDATIONS

- 9.1 This report provides a retail capacity assessment for Winchester. It provides a guide to the quantitative and qualitative shopping needs of Winchester in the period up to 2011. The principal conclusions of the analysis contained within this study are summarised below.

The Shopping Centre Hierarchy

- 9.2 The Local Plan Review should seek to identify Winchester's appropriate future role within the shopping hierarchy in central Hampshire, and should adopt a development strategy to ensure Winchester fulfils this future role. The findings of this study suggest that Winchester's catchment area overlaps with the catchment areas of competing centres, particularly Southampton. There is a possibility that Winchester's position as a sub-regional centre will reduce in the future if no improvements to retail provision are implemented over the plan period, particularly non-food shopping. In broad terms there are three potential strategies the Council could adopt, as follows:

- Status Quo – limited changes to shopping provision in Winchester;
- maintenance of Winchester's existing role within the sub-region; or
- enhancement of Winchester's existing role within the sub-region.

- 9.3 The first option may lead to a reduction in Winchester's position within the shopping hierarchy and may only be appropriate if there are major constraints that will limit the potential for new retail development in Winchester, both within the City centre and in appropriate accessible out-of-centre locations.

- 9.4 Local Plan policies should also seek to protect important local shopping facilities. The Local Plan Review should identify important local shopping facilities and should control the loss of retail and service uses within these centres.

Convenience Retail Capacity Analysis

- 9.5 On the basis that all existing convenience retailers trade at reasonable average turnover levels, the quantitative capacity analysis identifies that there is scope for additional food store floorspace within Winchester. We believe that the priority should

be to improve food shopping provision within the City Centre, certainly in the short to medium term (up to 2007). There should be scope to develop a food store of approximately 2,000 sq m net. The proposed MDA may provide a further opportunity to develop a new local/neighbourhood centre anchored by a small to medium sized food store, in the longer term.

Comparison Retail Capacity Analysis

- 9.6 The assessment of the shopping patterns in Winchester's catchment area identifies an outflow of comparison expenditure from Winchester. This reflects the attraction of competing centres, in particular Southampton. This seems likely to remain the case in the future. However, there may be potential to clawback some expenditure leakage, if the Council choose to enhance Winchester's current position in the shopping hierarchy.
- 9.7 The quantitative assessment suggests that there could be scope for an additional 4,000 to 5,400 sq m net of high street comparison retail floorspace in Winchester by 2011, depending on the implementation of the MDA. This level of floorspace will be required to maintain Winchester's current position in the shopping hierarchy.
- 9.8 This theoretical scope could provide an opportunity to improve the range and quality of comparison shopping in Winchester. If the Council wish to improve Winchester's position in the shopping hierarchy then we believe that realistic expenditure clawback could support at least 7,000 sq m net within the City Centre, with the MDA. This would represent a 22% increase in comparison floorspace in the City Centre. However, expenditure is projected to grow by at least 32% between 2002 and 2011. Therefore, it is unlikely that this scale of development will have an adverse impact on existing businesses within the City Centre.
- 9.9 Existing operator demand suggests there should be sufficient demand from new retailers to occupy this level of new floorspace without leading to significant relocations and an unacceptable increase in shop vacancies in the City Centre.
- 9.10 If the Council wish to maintain or enhance Winchester's shopping role then development opportunities to accommodate these floorspace projections should be identified and brought forward.
- 9.11 The capacity assessment also suggests that there could be scope for between 3,100

to 3,800 sq m net of bulky goods retail warehouse floorspace in Winchester by 2011. However, this projection assumes retail warehouses will maintain their current market share of comparison expenditure in the future. It may be possible to accommodate more bulky goods retailing within developments in the City Centre, which could reduce this retail warehouse floorspace projection.

- 9.12 We do not consider it necessary to allocate sites for retail warehousing in the Local Plan at this stage. The nature, scale and content of City Centre developments will need to be determined in order to assess the need for out-of-centre retailing. In addition the potential inclusion of the MDA is an important consideration. If proposals for retail warehouse do emerge, the developer must prove there is a clear need for the specific type of retail warehousing proposed, and should not rely on the floorspace projections within this study. Consideration should also be given to the potential to disaggregate the type of goods to be sold from the proposed retail warehousing, and the ability of City Centre opportunities to accommodate this type of retail sales.
- 9.13 In general retail developers with out-of-centre or edge-of-centre proposals must demonstrate a clear need for their development, and must demonstrate that their proposal cannot be accommodated on a sequentially preferable site or within City Centre development opportunities.
- 9.14 If edge-of-centre or out-of-centre sites are the only opportunities to meet identified needs then consideration must be given to the potential retail impact effects of any new proposal on the vitality and viability of the City Centre, as should transport issues including accessibility and the effect on the use of the car.