Retail Strategy: Evidence and Recommendations to Bath and North East Somerset

December 2008

urban practitioners UP

THE RETAIL GROUP

DTZ

Executive Summary

1. Introduction and scope (p2)

This section sets out the purpose of the document in proposing a retail strategy to Bath and North East Somerset Council. It is intended that the proposed strategy provides an important input for consideration in developing a Sustainable Community Strategy. The spatial elements of the strategy will need to be considered and resolved though the process of producing the Local Development Framework and associated Regeneration Delivery Plans for the district. Non-spatial elements of the strategy are proposed for consideration by the Council in developing its management, promotion and business development activities in relation to retail and the main retail centres.

2. Vision (p3)

Retail as a key ingredient of distinctive, sustainable and cohesive places is highlighted here. The vision is to establish the district as a leader in provision of a distinctive retail offer with clear roles for each of the retail centres and areas.

3. Context (p4)

Sets out the broad context, in terms of the role of the Council, local problems, national policy and trends, including the recession that emerged in 2008. It outlines an approach to planning for growth and enhancing existing retail areas within the context of national guidance.

4. Forecast Growth (p7)

Expenditure growth forecasts and the resulting forecasts of the potential for additional retail floorspace are provided for five year periods up to 2026. In Bath there is a forecast short term need for additional convenience goods floorspace, which would support a superstore or a number of smaller supermarket format stores, with a further need forecast from 2011 to 2026. In terms of comparison goods, the new Southgate development will meet the forecast potential for additional comparison goods floorspace up to around 2016, but beyond then the forecast suggests potential for significant additional provision by 2026. The potential capacity for additional floorspace for large format style comparison retailing (currently often provide in retail warhouses) is modest in the short term, potentially rising to a more significant level by 2026.

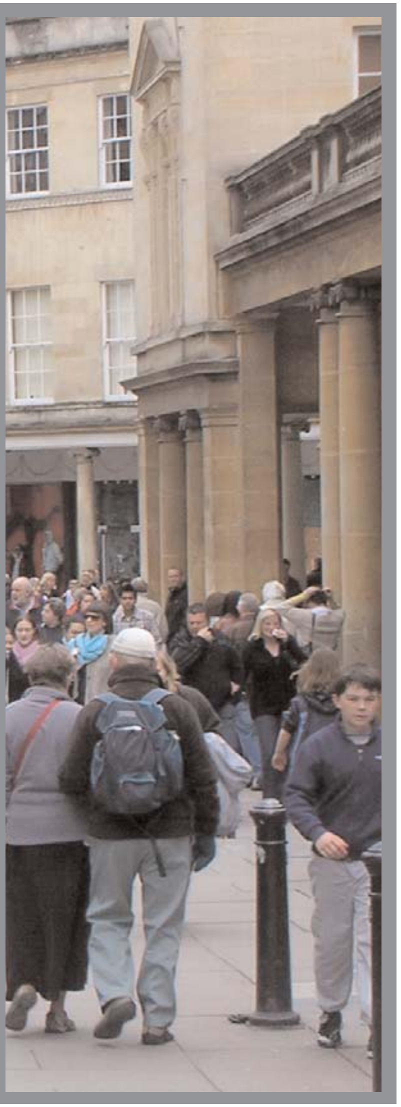
In Keynsham there is a short term potential for additional convenience goods floorspace to support a town centre format foodstore and 'clawback' expenditure that is currently 'leaking' to stores outside Keynsham. There is also potential for additional comparison goods floorspace, reaching a significant level by 2026.

There is forecast convenience goods floorspace capacity for Midsomer Norton up to 2011 that would support a town centre format store or extension of existing stores, while scope for additional comparison goods floorspace is modest. There is no forecast significant capacity for growth in Radstock in the short term, but a modest potential for additional convenience goods floorspace by 2026, sufficient to support a town centre format store. However, capacity is greater if some of the forecast potential for Midsomer Norton is absorbed in Radstock.

This section makes it clear that the figures are forecasts and not targets. They need to be reviewed at appropriate intervals.

5. Strategy (p.13)

Overarching principles for the strategy focus on sustainability and enhancing the role, distinctiveness and the experience offered by places. Roles and responsibilities are described and district wide proposals are put forward, ranging from establishment of a retail investment panel to a series of measures to support the independent sector. Location specific strategies then follow:



Rural Areas (p.18): The proposals focus on provision of good information and advice, providing access to Council and other services via rural shops and creating the physical conditions for rural shops to thrive.

Market Towns – Keynsham (p.20): Keynsham town centre has the potential for significantly developing its role as focal point serving a growing local community. Key elements of the strategy are, ensuring effective town centre management, preparing a public realm and movement strategy, developing a new foodstore in the centre that is well connected to the High Street, refurbishing or redeveloping the modern shopping centre and building distinctiveness through Fairtrade, the Farmers' Market and local supply.

Market Towns – Midsomer Norton (p28): Midsomer Norton Town Centre has the potential for developing its role in serving the south of the district and providing a highly attractive retail environment. Key elements of the strategy include effective town centre management, preparing a public realm and movement strategy, establishment of frameworks to guide development on opportunity sites, particularly in respect of land around the former Palladium cinema, encourage more food and drink outlets, capitalising on opportunities for outdoor tables and chairs, and developing distinctiveness through Fairtrade, the Farmers' Market and local supply.

Market Towns – Radstock (p32): Radstock is a small town centre that has the potential to enhance its role in serving the day to day needs of the local community. The proposed strategy focuses on effective town centre management, building upon the town's character and tradition of independence and utilising the redevelopment opportunities of the former railway land and Co-operative store sites to create a more integrated town centre with a stronger retail heart.

City of Bath – Overview (p36): A broad overarching approach is outlined here, with a proposed focus on the city centre in terms of accommodating future growth.

Bath City Centre (p38): The City is a unique centre with a distinctiveness enhanced by its range of independent shops. Broad principles are set out to underpin the strategy, and the Bath customer catchment profile is summarised here. It is suggested that Bath should develop a reputation as a city of retail innovation that welcomes and pioneers new concepts. The proposals focus on improving the existing central retail area and accommodating future growth.

Measures to enhance the existing retail area range from, collaborative investment management between the major landlords in order to target retail investment and optimise the city centre mix, to implementation of the Public Realm and Movement Strategy, stepping up the range of on street family entertainment and street animation and enhancing retail skills,.

It is proposed that future growth should focus on strengthening the central retail area, through an expanded city centre anchored by retail nodes at Southgate, The Podium/Broad Street area and Green Park Station. Accommodation of future requirements for larger formats should be considered within mixed use development at the western end of James Street West, and potentially as part of mixed use development of the current Homebase site. Southgate should first be allowed to become established and growth forecasts should then be reviewed to take account of the real effects of this scheme on shopping patterns and any long term changes in consumer spending that emerge through a future economic upturn. The next priorities are the Podium/Hilton/Cattlemarket and Broad Street car park opportunity sites within a comprehensive approach to the northern area of the city, between Queen Square and the river. Beyond this further growth should be westward, building upon and knitting together existing fragmented frontages, with a distinctive and complementary offer at Green Park Station.

Any convenience goods floorspace need that cannot be accommodated in the centre or on its edge, should be in medium size stores within or close to existing or planned residential areas.

Outer Bath – neighbourhood centres (p58) : This section sets out a broad approach to the neighbourhood centres in Bath. It highlights the importance of the environment as a context for success in these centres, suggests an audit of each centre, support for development of traders' associations and provision of access to good information and advice via the recommendation on this within the district wide proposals.

6. Conclusions (p62)

Broad conclusions are set out together with a schedule of proposed priority actions.

Appendix – Bath city centre opportunity sites and connectivity

This appendix includes photographs of the key development opportunities in the city centre and comments on their connectivity in relation to the existing retail area.

Annexe A: Quantitative Need for New Retail Development

This annexe provides a full description of the forecasting methodology and the detailed forecasts of quantitative need for new retail floorspace.

Annexe B: Retail Review and Customer Profile Report

This annexe sets out a review of Bath city centre's current offer, an analysis of the profile of its customer catchment and a review of each of the market town centres.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Contents

1.	**Introduction and scope**	**2**
2.	**Vision**	**3**
3.	**Context**	**4**
4.	**Forecast growth**	**7**
5.	**Strategy**	**13**
	Overarching principles	13
	Location specific strategies	17
	Rural areas	18
	Market towns	20
	Keynsham	20
	Midsomer Norton	28
	Radstock	32
	City of Bath	35
	Bath City Centre	38
	Outer Bath	58
6.	**Conclusions**	**62**
	Action Plan	63

Appendix: Key Bath City Centre opportunity sites and connectivity 67

Annexes

Annexe A: Quantitative Need for New Retail Development
Annexe B: Retail Review and Customer Profile Report

urban practitioners

DTZ

This document has been produced on behalf of Bath and North East Somerset Council by a team led by Urban Practitioners and including retail development advisors, DTZ, and consumer experts, The Retail Group.

1. Introduction and scope

Introduction

This document sets out a proposed strategy for retailing and retail development in the Bath and North East Somerset District over the next 20 years. It represents one of a suite of documents which will inform the establishment of a policy and delivery framework to steer and manage development and change in the district through the Local Development Framework (LDF) and other documents (see Figure 1.1). The LDF will play an important role in setting the spatial vision and strategy for the District's centres.

Additional strategies which are particularly linked to the quality of the retail environment and economy are the Public Realm and Movement Strategy for Bath and the Business Development and Employment Land Study. Together these strategies aim to help bring about a renaissance in Bath and the major towns, re-establishing these centres as attractive community hearts and visitor destinations. This Retail Strategy sets out a vision which the suite of strategies will be instrumental in helping to realise. The cumulative changes proposed, if pursued by the Council, will help ensure the sustainability of the District's centres into the future.

This work is linked and seeks to test a series of place-making propositions for the future of each of the main urban centres in the Future for Bath, the Future for Keynsham and the Future for the Somer Valley (Midsomer Norton / Radstock area). Collectively this work is known as the Future for Bath and North East Somerset. The intention is that this 'Futures' work will inform development of the Community Strategy and provide a key input for consideration in developing the new Local Development Framework (LDF).

Scope

The scope of this document is focused on retail development in the District. It identifies the main issues associated with the retail economy and considers its role in the wider success of the District's main centres.

The Strategy identifies actions that the Council has influence over to support the required level and nature of retail development. In addition to the Council, other stakeholders and key players, particularly private sector developers, land owners and retail operators will need to be engaged to ensure the Vision for the District's retail future is achieved.

This strategy has sought to adopt an objective approach to ensure consideration of all options for responding to the retail issues and opportunities. Its conclusions however, broadly accord with the propositions set out in the 'Futures' work.

Allocations for additional floorspace will ultimately be determined through the LDF process taking account of other town and city centre uses. The strategy set out in this document will help provide the basis for these decisions.

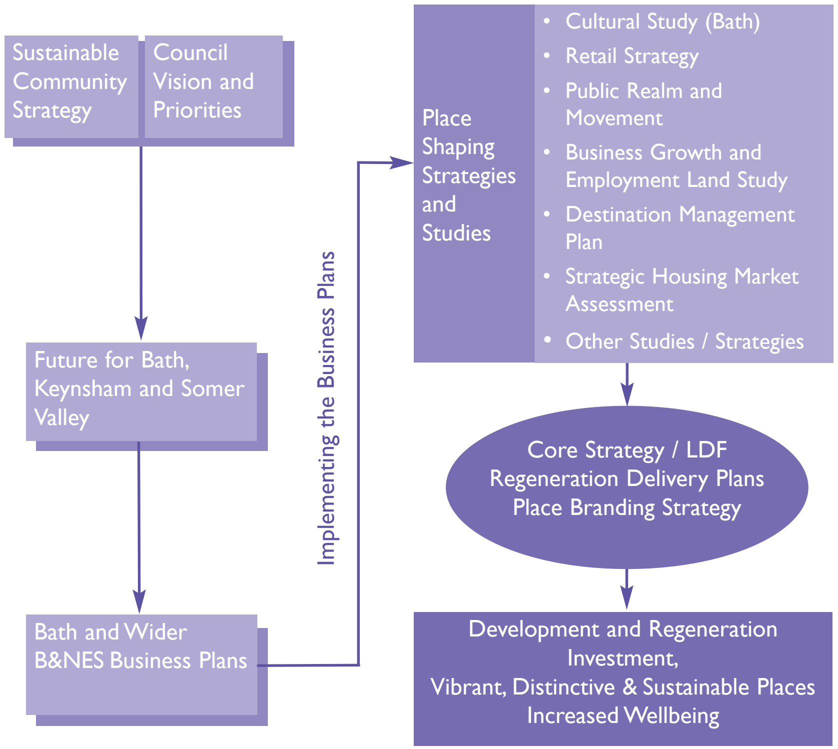

Figure 1.1: Contributions to policy and delivery framework


Midsomer Savouries
Midsomer Savouries

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2. Vision

2.1 The big picture

Shopping is a core activity. Whether it be simply buying the food we eat and the clothes we wear, or the more extravagant shopping trips to buy new entertainment systems or gifts for friends and family. It is an activity which plays a crucial role in the success of towns and cities across the world and has a significant effect on people's quality of life.

The choice of where we shop has important impacts, not least in the energy we consume in getting to the shops, but also in the social cohesion of communities.

A structured approach to how retail is provided is therefore an essential part of city and District management. This document sets out the recommended retail and retail development strategy for Bath and North East Somerset up to 2026, which will be tested through the LDF process.


ares retail in Bath

Fashion retail in Bath

2.2 The local response

Responding to the big picture at the local level is a necessity. Some key factors are important to achieve in this respect:

- Local and accessible provision with a key role for walking and cycling.
- Quality products and services.
- Local products and a strong relationship between centres and their hinterlands.
- A good balance between independent and multiple provision – recognising the District's history of high quality independents.

The District must respond to consumer needs - both in terms of retailing as a functional activity as well as an enjoyable experience and leisure activity. Retail will play a central role in achieving successful and sustainable places across the District.

2.3 The Vision

Retail is a key ingredient of distinctive, sustainable and cohesive places. The vision is to establish the district as a leader in providing a distinctive retail offer, with a high proportion of local, high quality independent retailers set within a world class shopping experience. In addition, the aim is to reduce leakage of expenditure outside the area to help support the local economy and reduce travel. Each of the centres will have defined roles within this vision:

Bath – a city of choice – where visitors choose to shop, residents have a quality choice on their doorstep and retailers choose to be. Retail plays an important role in contributing to the City as a unique asset for the District, West of England and beyond.

Keynsham – a local centre for a growing community, building on its existing Fairtrade status.

Midsomer Norton – a local centre and market town for a wide catchment.

Radstock – a convenient centre for a growing community and a stopping point on the visitor map. A modernised retail offer and a more clearly defined retail destination.

Rural areas – supporting community identity, social inclusion and the source of local products.

Attractive retail alleyways in Bath City Centre

3. Context

3.1 The retail sector

The retail sector has a dynamic and extremely competitive nature. It is important, therefore, to recognise that change is inevitable. A proactive approach to this dynamism is required to ensure against reactive measures which could see change accommodated in a detrimental manner in the District.

Retail investment is largely provided by the private sector, and this Strategy seeks to support such endeavours for the benefit of the District as a whole. The local authority and its partners have a major role to play in supporting and steering change to help shape the future of retailing in the District, through:

- Creating the right environment for investment.
- Planning for and stimulating new development.
- Managing and promoting retail centres.
- Providing better access to information and advice.
- Direct management of its retail estate

3.2 The local problems

Local analysis, combined with a significant amount of consultation with local stakeholders, has identified some of the key issues associated with the local retail market:

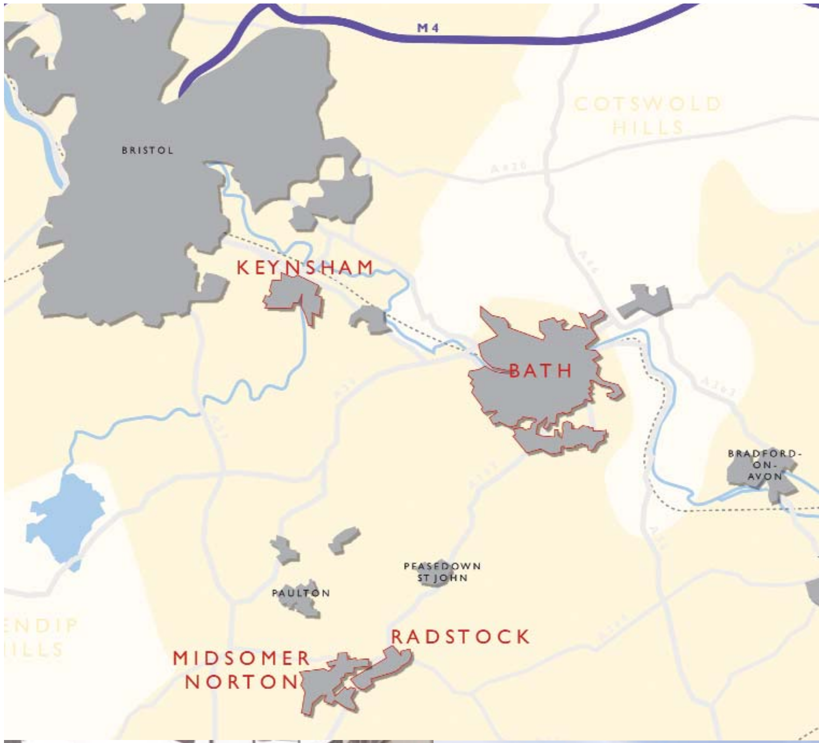
- Competition posed by other centres outside the District;
- Poor quality public realm.
- A diverse customer base encompassing significant, and sometimes conflicting, visitor and resident demand.
- Access and congestion problems.
- The loss of local shops and independent traders.
- Lack of clarity over the role and offer of centres.
- The pressure of population growth and the need for transport improvements which can be catalysts for change.
- A GB average customer profile but with some significant variance between areas of wealth and deprivation.
- Bath has fallen in national retail ranking - identified by Experian as a 'fading star'.

3.3 The national picture

Set against these local issues are a number of national trends which have affected the retail market. These include the following:

- Between 1995 and 2000, the UK lost one fifth of its local grocery sector shops and services.
- In 1960, small independent retailers had a 60% share of the food retail market, by 2000 it was down to 6%.
- Some researchers have suggested that the opening of large supermarkets can result in the loss of jobs in the locality.
- Retail expenditure has been growing – between 2000 and 2006, for example, per capita comparison goods

Figure 3.1: Strategic context




Keynsham High Street


Radco store in Radstock

- expenditure grew at an annual average of 6.7% (well above the historic long term trend of 4.9% pa). Growth is projected to continue, but at a much reduced rate.
- A growth in sales densities – the provision of new floorspace has not kept up with demand and has reached a plateau – meaning some retailers can be considered to be over-trading.
- An increasing provision of retail capacity is being provided in shopping centre formats.
- Retail parks and warehouses are still in high demand but are generally being curtailed as a result of national guidance supporting a town centre focus.
- Internet shopping is taking a growing slice of the market and in 2006 accounted for 4% of all retail sales - this is forecast to rise to almost 9% by 2011 (Verdict Research, 2007). The internet is currently having most impact in the music and video, electrical goods and books markets; with food and groceries and clothing and footwear forecast to experience much increased impacts in the next 5 years.
- A recognition of shopping as an experience has resulted in an increasing number of stores providing interactive elements.
- A gradual shift in high street retail from fashion to homewares, luxury and leisure goods retail.
- An increasing importance placed on ambience and socially and environmentally responsible products and brands.
- An increasing recognition of customer service as a major factor in consumers' choice.

3.3.1 Consumer trends

Emerging consumer trends are also affecting retail development and the economy. Some trends which will have an important impact over the next few decades are:

- An ageing population.
- Fewer families and more single person households.
- Hectic and busy lifestyles requiring easy and convenient shopping.
- Precious leisure time - shopping is increasingly a treat.
- The increase in internet shopping and multi-channel retailing.
- Choosier habits and greater choice of shopping destinations.
- Longer working hours - retailing needs to be convenient to work.
- Spur of the moment approach - increasing desire for different and individual experiences.
- Eating out more frequently.
- A greater interest in the source of products and a more ethically aware approach.

3.3.2 Policy approach

National planning policy supports a "town centres first" approach to planning for retail and other main town centre uses. As set out in Planning Policy Statement 6 (PPS6), retail development should therefore be achieved through a pro-active, plan-led system where the sequential test of the sites steers the location of growth to existing centres. National policy advises that the growth and success in retail development should be spread to smaller centres to support their collective role, whilst maintaining the attraction of larger city centres.

3.4 The challenges

The national and local issues set a challenge for successful retail in the District.

3.4.1 Global economic downturn

During the final stages of completing this strategy there has been a global downturn in economic activity, precipitated by a crisis in the banking sector and resulting in the UK economy recently being confirmed as being in recession. This clearly impacts on the retail sector.

The evidence and proposals set out in this strategy are based upon a long term view up to 2026, within which some fluctuations in growth of expenditure would be expected. However, over the long period to 2026, the ultra-long term trend average rate of growth in per capita expenditure on comparison goods which has been used should smooth out such fluctuations. It is a fairly cautious rate of growth, which is well below the very high rates of growth in the last years of the economic 'boom'. Use of the ultra-long term trend rate of growth in per capita expenditure on comparison goods means that the short term forecasts to 2011 may be likely to prove somewhat optimistic (depending on the depth and length of the recession); but by about 2016, growth may well have again 'caught up', such that the forecasts from 2016 onwards are more realistic. The convenience goods forecasts are less sensitive to changes in expenditure growth rates, as they are based on a much lower rate of growth; and of course food purchasing continues throughout a recession, although the nature and profile of it changes.

The current recession enhances the importance of some of the recommendations in this strategy. As the document advises, projections of potential future floorspace needs are not targets but aim to provide a broad guide based on the best available information at the time they were prepared. The recommendation for a future review of the forecasts in order to take account of actual changes is particularly important. The first review will need to be timed to consider the impact of the Bath Southgate development once trading is established, and in the light of the scale and nature of the expected future economic upturn.

To help offset the effects of the economic climate it will also be important to pursue the management and associated measures to support and promote the retail sector, particularly the independents, plus the public realm improvements and key development proposals as set out under the Priority Actions in Chapter 6. Within Bath, the recommendation of enabling the Southgate development to become established before promoting any additions to comparison goods floorspace is particularly important.

3.4.2 Local issues

Some of the local challenges which this Retail Strategy will need to address are:

District-wide

- Supporting the independent offer whilst maintaining good representation of multiple operators.
- Accommodating growth whilst retaining distinctiveness and enabling sustainable, mixed use centres.
- Creating supportive conditions for local and rural shops while acknowledging the reality of market trends.
- Attracting investment to improve the retail offer of the market towns.
- Communicating clear and accessible information about the offer of each centre.

Bath-specific

- Building upon the unique and distinctive nature of the current offer, while meeting functional and efficiency requirements of customers and the retail sector.
- Enhancing the experience without losing the charm.
- Spreading footfall without harming current areas of vitality.
- Moving Bath up the retail ranking without creating a bland offer.
- Attracting a wealth of visitors whilst providing for local people.

3.5 The approach

This Strategy looks to interpret national policy alongside local priorities. The objectives of PPS6 include:

- Planning for the growth and development of existing centres.
- Promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.

The uses to which PPS6 applies are retail; leisure, entertainment facilities, and the more intensive sport and recreation uses; offices, both commercial and those of public bodies; and arts, culture and tourism.

In selecting sites for allocation, PPS6 suggests local considerations should be taken into account such as:

- The benefits of developing on previously-developed sites which may require remediation.
- The net additional employment opportunities that would arise in a locality as a result of a proposed allocation, particularly in deprived areas.
- The increased investment in an area, both direct and indirect, arising from the proposed allocation and improvements in productivity, for example arising from economies of scale.
- Opportunities to combat social exclusion, such as increasing the accessibility of a range of services and facilities to all groups.

This strategy, therefore, takes a considered approach to each of the centres in order to ensure proposals achieve the most sustainable outcome.

Independent retail in Radstock

4. Forecast growth

4.1 Introduction

The evidence base for the retail strategy includes retail assessments of Bath, Keynsham, Midsomer Norton and Radstock. These assessments cover aspects such as vitality and viability, leisure provision, retailer demand, evening economy appraisals and consultations with stakeholders. This section provides a summary of findings, and the full assessments can be found in the Annexe A. A key element of the assessments is that of forecasting the quantitative need for new retail floorspace in each centre. A clear understanding of the context of the centres is needed, and caution must be employed in using the forecasts. Importantly, these forecasts ne--ed to be subject to review, particularly the longer range figures, to ensure they take account of changes in the context.

This section identifies the future need for retail floorspace in the City of Bath, Keynsham, Midsomer Norton and Radstock for both convenience and comparison goods. It provides an evidence based, quantitative need assessment for new floorspace as required by PPS6. The likely amount of retail floorspace needed within the four centres up to 2026 has been calculated and used to inform the strategies in Section 5.

While increases in per capita expenditure is the key factor in terms of comparisons goods total expenditure and resulting retail floorspace needs, for convenience goods population change is almost as significant. Widely accepted population changes have been used. The Regional Spatial Strategy (RSS) will have an impact on future population growth. However, as these targets are not yet finalised, account has been taken of the RSS housing targets proposed by the Panel following the RSS Examination in Public. These are broadly midway between the original Draft RSS and the increase contained within the recent Secretary of State Proposed Changes, with the targets above the Draft RSS figures being the subject of objection by the Council and others.

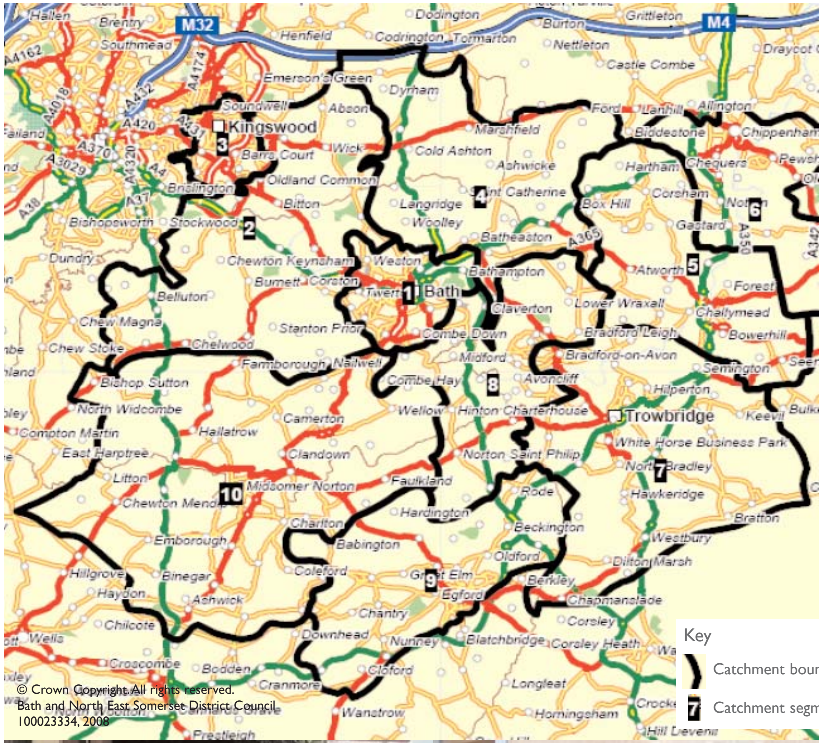
It is not feasible for this strategy to draw conclusions on the soundness or otherwise of the various RSS housing targets. The Council and others consider the targets above the draft RSS level to be unsubstantiated and even the targets in the draft appear very challenging given the implied delivery rate per annum and the current market conditions.

It is only in the latter stage of the forecast period that planned growth may be likely to significantly affect the trend based population forecasts used, depending on what level of planned growth is ultimately established. Therefore up to 2021 the forecasts in this document are based solely on unadjusted trend based population forecasts. It is only from 2021 that some adjustment has been made to account for the RSS.

4.2 Forecasting method

A Household Interview Survey of shopping patterns was carried

Figure 4.1: BANES Retail catchment zones




Food retail in Oldfield Park


Restaurant in Bath

out within the catchment area. A Retail Capacity Forecasting Model then used the results of the survey as its 'baseline', using a conventional and widely accepted approach, to complete the following tasks:

- Calculate the total amount of convenience and comparison goods expenditure available within the catchment area.
- Allocate the available expenditure to Bath City Centre and non-central stores, and to the smaller town centres, based on the results of the survey plus estimates of visitor expenditure in Bath City Centre, so as to obtain estimates of current sales and forecast future sales in each.
- Compare the estimated sales in the city centre, town centres and non-town centre food stores and retail warehouses with existing floorspace so as to assess the current trading performance of each shopping destination, and the capacity to support further growth in floorspace.

4.3 Convenience and comparison goods

Convenience goods and comparison goods are defined as follows:

- Convenience goods: Food, alcoholic drink, tobacco products, newspapers and periodicals, non-durable household goods.
- Comparison goods: Clothing and footwear; household textiles and soft furnishings; furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, Personal and luxury goods.

4.4 Existing Floorspace

Using information available, the existing net convenience goods floorspace in Bath City Centre is 6,912 sq m net with a further 4,053 sq m net in Outer Bath (encompassing Bath's principal out-of-centre foodstores). For Keynsham it is estimated to be 4,189 sq m net; for Midsomer Norton it is 4,681 sq m net; and for Radstock is 1,472 sq m net.

Using Council data and accounting for net comparison good sales area in the relevant main food stores, the resulting total comparison goods shop floorspace in Bath City Centre is estimated as 56,167 sq m net. For Keynsham it is estimated to be 6,165 sq m net; for Midsomer Norton is 5,733 sq m net; and for Radstock the figure is 4,934 sq m net.

Figures 4.2-4.5 illustrate the current retail area for each of the centres. Tables 4.1-4.4 provide an overview of the existing floorspace and activities in each of the centres as a context for considering future growth. The key features of the centres' diversities are also outlined in a series of bullet points.

4.4.1 Bath City Centre

Bath is a city centre located 20 kilometres south east of Bristol. Bath has a total population of 84,000 people representing nearly half of the District's residents. The City Centre has a strong retail legacy and analysis shows its retail market has the following characteristics:

- The level and diversity of retailer demand in Bath is very strong.
- The level of demand from small scale leisure operators requiring smaller units is

Figure 4.2 Primary retail core and frontage

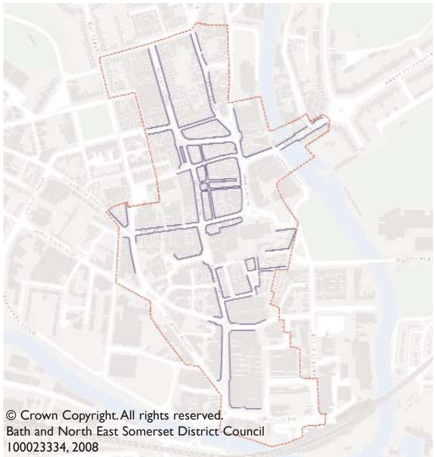


Table 4.1: Bath - Key retail statistics (DTZ, 2007)

Source: Experian GOAD - N.B. Not necessarily the same as the Council's IGD data used in forecasting future retail capacity

	Number of units	Percentage of units (appropriate national average in brackets)	Gross ground floor floorspace (sqm)	Percentage of floorspace (appropriate national average in brackets)
Comparison	340	54% (48%)	60,763	67% (53%)
Convenience	44	7% (9%)	6,653	7% (17%)
Services	95	15%	6,783	7%
Catering	103	16% (30%)	11,849	13% (20%)
Leisure	5	1%	321	0%
Vacant	48	8% (11%)	4,234	5% (8%)
Total	635	100%	90,603	100%

good, however larger scale operators (e.g. major cinema or bowling facilities) have not shown an interest.

- The analysis of floorspace suggests Bath's provision is performing well with low vacancy. Bath's building stock has a major influence over its retail offer and in particular its high proportion of distinctive independent shops.
- Bath has below average convenience provision which is, at least in part, a reflection of the special nature of its built form. The floorspace analysis shows a significant relative under representation of convenience retail.

4.4.2 Keynsham

Keynsham is located midway between the centres of Bath and Bristol and close to the south eastern suburbs of Bristol. It has a population of 15,500. The centre has the following characteristics:

- Generally good representation of service retail, but low levels of catering establishments.
- Significant number of charity shops and financial/property services.
- A small number of specialist shops.
- Below average convenience offer within the town centre.
- Low vacancy rates.

Figure 4.3: Town centre area and primary retail frontage

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Bath and North East Somerset District Council
100023334, 2008

Table 4.2: Keynsham - Key retail statistics (DTZ, 2007)

Source: Experian GOAD - N.B. Not necessarily the same as the Council's IGD data used in forecasting future retail capacity

	Number of units	Percentage of units (appropriate national average in brackets)	Gross ground floor floorspace (sqm)	Percentage of floorspace (appropriate national average in brackets)
Comparison	60	42% (48%)	5,556	43% (53%)
Convenience	12	8% (9%)	1,789	14% (17%)
Services	49	34%	3,678	28%
Catering	17	12% (30%)	1,481	11% (20%)
Leisure	0	0%	0	0%
Vacant	6	4% (11%)	559	4% (8%)
Total	144	100%	13,063	100%

4.4.3 Midsomer Norton

Midsomer Norton forms the dominant of two towns in the south east of the District with a combined population of 21,000. The centre has the following characteristics:

- Significantly more diversity than Keynsham.
- Some cafés and restaurants.
- High number of small units, with lack of medium and large options.
- Some specialist shops, for example, fabric shop and skate shop.
- Good number of professional services.
- Low vacancy rates.

Figure 4.4: Town centre area and primary retail frontag

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100023334, 2008

Table 4.3: Midsomer Norton - Key retail statistics (DTZ, 2007)

Source: Experian GOAD - N.B. Not necessarily the same as the Council's IGD data used in forecasting future retail capacity

	Number of units	Percentage of units (appropriate national average in brackets)	Gross ground floor floorspace (sqm)	Percentage of floorspace (appropriate national average in brackets)
Comparison	50	37% (48%)	4,884	44% (53%)
Convenience	13	10% (9%)	1,669	15% (17%)
Services	49	37%	2,812	25%
Catering	18	13% (30%)	1,396	13% (20%)
Leisure	0	0%	0	0%
Vacant	4	3% (11%)	325	3% (8%)
Total	134	100%	11,086	100%

Figure 4.5: Town centre area and primary retail frontage

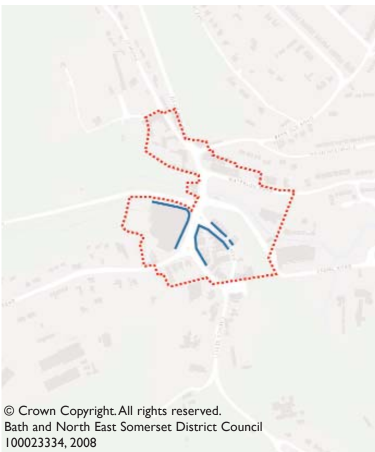


Table 4.4: Radstock - Key retail statistics (DTZ, 2007)

Source: Experian GOAD - N.B. Not necessarily the same as the Council's IGD data used in forecasting future retail capacity

	Number of units	Percentage of units (appropriate national average in brackets)	Gross ground floor floorspace (sqm)	Percentage of floorspace (appropriate national average in brackets)
Comparison	18	44% (48%)	3,015	43% (53%)
Convenience	5	12% (9%)	3,391	48% (17%)
Services	13	32%	464	7%
Catering	5	12% (30%)	141	2% (20%)
Leisure	0	0%	0	0%
Vacant	0	0% (11%)	0	0% (8%)
Total	41	100%	7,011	100%

4.4.4 Radstock

Radstock is located adjacent to the eastern edge of Midsomer Norton. The centre has the following characteristics:

- Strong convenience bias to its retail offer.
- Diverse offer of services given the centre's size.
- Smaller units are mainly service providers, for example, hairdressers, florist, coffee shop and takeaway.
- Significant proportion of total ground floorspace is in one superstore run by Radstock Co-operative Society.
- The superstore is separated from other shops by busy roads.

4.5 Future Development

To forecast the amount of new floorspace required between now and 2026 two scenarios have been assessed:

- Scenario 1 – the 'baseline' scenario, which assumes that there will be no change in the current market shares of available expenditure attracted to the centres through to 2026. For Bath, this assumes that improvements resulting from the Southgate development will be exactly matched by improvements in other centres particularly Bristol City Centre as a result of the Cabot Circus scheme.
- Scenario 2 – assumes realistic increases in market shares of comparison goods expenditure attracted by Bath City Centre as a result of the Southgate development. It also assumes increases in convenience goods market shares attracted by Keynsham and Radstock, as a result of potential new foodstore developments in those town centres, accompanied by falls in market shares at Midsomer Norton due to the latter.

For the City of Bath, the Scenario 2 forecasts are more realistic than those of Scenario 1; and for Keynsham, Radstock and Midsomer Norton they are more realistic if the potential new retail developments tested occur.

Tables 4.5 and 4.6 outline the forecast capacity for new retail floorspace across the District. Figures for the two scenarios are shown.

4.6 Conclusions

4.6.1 Convenience Goods

The retail capacity forecasts for convenience goods are indicated in Table 4.5. They suggest there will be capacity for 3,250 sq m net food retail in the City of Bath from about 2011 or earlier. This floorspace could be in a single large new superstore, a number of smaller stores or could consist of one smaller supermarket, plus extensions to existing stores or a new discount supermarket. Market stall provision could also help to meet a small amount of this demand. A sequential approach should be applied in selecting a suitable site or sites. This means that if there are suitable and available sites in or on the edge of the city centre or a local neighbourhood centre in Bath, they should be preferred to out-of-centre sites.

In Keynsham, there will only be sufficient capacity for a new food superstore in the town centre at an early date if the existing Somerfield or Pioneer Co-op food store closes. Such a new store would have to be large in order to achieve the degree of claw back of expenditure leakage necessary to ensure its support. A store of this size would carry the risk of causing closure of one of the existing food stores – but if such a closure did occur, this would result in overall modernisation and improvement of the town's food shopping facilities. Otherwise, there would be capacity for a new town centre format food supermarket from about 2011 to 2016. Whilst this would not achieve the same degree of claw back, it would also improve food shopping facilities in Keynsham town centre.

In Midsomer Norton, the existing out-of-centre Tesco is heavily overtrading. This creates capacity for additional food store floorspace. Scenario 1 illustrates that there will be capacity for a new town centre format supermarket from 2011 (of 1,200 sq m net), or extension of an existing store. However, if the existing convenience offer in Radstock was redeveloped into a new modern supermarket format with greater appeal, this could absorb some of the forecast capacity for Midsomer Norton in the short to medium term.

In Radstock, the forecasts have allowed for sales in the existing convenience goods shops as a group, to rise to the level based on estimated 2004/05 company averages. This would probably require refurbishment of the Radstock Co-operative store, or its replacement with a similar size new store, either on the same site or elsewhere in Radstock. Thus Scenario 1 implicitly assumes such a refurbishment or replacement, with Radstock Co-operative as the operator of the refurbished or replacement store. On this basis, there will be no capacity for additional convenience goods floorspace throughout the forecasting period. As with Keynsham, the forecast negative capacity means that the existing stores would trade at somewhat below the level based on estimated company averages. Again, this is not particularly significant; as an average is just that, and many stores are able to trade successfully at below company average levels, just as others trade at above the average. A number of other scenarios were considered for Radstock, including additional need being met in Midosomer Norton, replacement of Radstock Co-operative with another supermarket and the rationalisation of the Radstock Co-operative store. For Scenario 2 the likely effects of the replacement of the Radstock Co-operative store by a store operated by one of the principal food retailers was modelled. As discussed above, this will reduce the retail capacity available for Midsomer Norton. In effect, some of the capacity in Midsomer Norton forecast under Scenario 1 for that town, would be transferred to Radstock, as a result of providing new modern floorspace in Radstock rather than in Midsomer Norton. From increasing the market share from 2011 there should be capacity for about 2,100 sq m net of additional convenience goods floorspace in Radstock at that date, which should increase throughout the forecasting period to about 2,600 sq m by 2026, if forecast trends occur.

Scenario 1 is the 'baseline' scenario

Scenario 2 – assumes increases in market shares are attracted by Bath City Centre as a result of the Southgate development and Keynsham and Radstock as a result of convenience development.

The forecasts in this table are cumulative. The forecasts are for further floorspace in addition to the Bath City Centre development at Southgate.

Table 4.5: Forecast convenience goods floorspace need (sq m net sales area)

Convenience goods capacity		2011	2016	2021	2026
CITY OF BATH	Scenario 1	3,250	4,150	5,150	6,100
	Scenario 2	3,250	4,150	5,150	6,100
KEYNSHAM	Scenario 1	-300	-50	150	450
	Scenario 2	1,600	2,050	2,550	3,100
MIDSOMER NORTON	Scenario 1	1,200	1,600	2,000	2,350
	Scenario 2	350	650	1,000	1,300
RADSTOCK	Scenario 1	-250	-200	-150	-150
	Scenario 2	2,100	2,300	2,450	2,600

A theoretical third scenario in which Radstock Co-operative refurbishes or redevelops its existing store (without increasing the convenience goods net sales area), and a modern new foodstore of about 2,000 sq m net convenience goods floorspace is developed in Radstock by one of the major national food retailers, was also tested. This would require transfer from Midsomer Norton to Radstock of all the growth potential in the former. This would involve a fairly substantial impact on the existing foodstores in Midsomer Norton (particularly Tesco); and no opportunity of developing additional convenience goods floorspace there until very late in the forecasting period. In view of the geographical distribution of population (which is biased in favour of Midsomer Norton), it is considered that such a scenario would be somewhat unlikely in commercial terms. However, it might be possible if forecast need in Midsomer Norton could not be accommodated there, and a retailer is willing to provide it in Radstock instead.

4.6.2 Comparison Goods

Table 4.6 illustrates the forecast capacity for comparison goods floorspace. For the City of Bath the forecast is divided into city centre format floorspace and retail warehouse format. In the City of Bath it shows an apparent discrepancy between need and provision of city centre format floorspace. This is not uncommon when new developments come on stream. Whilst expenditure increases in a steadily rising curve, new floorspace is often provided in major new developments. This creates a stepped increase in floorspace which initially rises above the curve of expenditure growth for a short period. Prior to the provision of new floorspace, unmet need will in part be met by overtrading on existing floorspace. There is therefore a settling down period as new floorspace is added. This will be the case with Southgate which is clearly a vital addition to enhance Bath's retail offer and position in relation to competing centres. The forecast capacity outlined in Table 4.6 is in addition to net additions arising from the Southgate development.

The new Southgate Centre will address short term requirements and provide a 'breathing space' in which to plan for and work up proposals for the next phase of City Centre retail development. From about 2021 onwards, rising expenditure should support substantial new comparison goods shopping development. The analysis of Bath's existing offer identifies a gap in the home improvements offer.

There will also be some growing capacity for additional large format floorspace and comparison goods floorspace in food superstores in Bath over the forecasting period. A sensitive and innovative approach to accommodating this will be required.

Keynsham and Midsomer Norton town centres both have similar levels of forecast capacity for comparison goods in Scenario 1, although Keynsham has greater potential if a new food superstore can be attracted to a town centre site, as convenience development reinforces a centre's appeal and market share. Only modest scale comparison goods development will be supportable in these two town centres (particularly in Midsomer Norton) over the forecasting period. This is also true of Radstock, where if a new supermarket was provided, , as assumed in Scenario 2 (for example replacing the existing Radstock Co-operative store) the capacity for comparison goods floorspace would increase, however not to any substantial level.

4.7 Scenarios

The two scenarios explored indicate a range of forecast floorspace need. Scenario 2 is considered to be the more realistic scenario for Bath and Keynsham as it takes account of the likely effect of planned developments and assumes an increased market share as a result. Scenario 2 should therefore should be planned for in the short and medium term in these locations. For Midsomer Norton and Radstock the preferred route will be dependent upon the development opportunities available and the balance desired between the two settlements. This will need to be carefully steered by the Council to achieve the best outcome. It is important that the forecast figures are used with caution and that they are kept under careful review over the Strategy period. They are forecasts based on the best information available and are not targets. The impact of the Southgate development, in particular, will need to be closely monitored and the forecast figures reviewed accordingly.

Table 4.6: Forecast comparison goods floorspace need (sq m net sales area)

Comparison goods capacity		2011	2016	2021	2026
CITY OF BATH (city centre format)	Scenario 1	-13,000	-1,500	11,800	26,650
	Scenario 2	-6,550	5,950	20,450	36,550
CITY OF BATH (warehouse format)	Scenario 1	1,500	3,450	5,800	8,300
	Scenario 2	600	2,450	4,650	6,950
KEYNSHAM	Scenario 1	350	1,500	2,900	4,500
	Scenario 2	3,250	5,100	7,200	9,700
MIDSOMER NORTON	Scenario 1	300	1,150	2,100	3,100
	Scenario 2	300	1,150	2,100	3,100
RADSTOCK	Scenario 1	-400	50	600	1,150
	Scenario 2	750	1,150	1,700	2,250

The forecasts in this table are cumulative.
The forecasts are for further floorspace in addition to the Bath City Centre development at Southgate.

5. Strategy

5.1 Overarching principles

In order to ensure a vibrant and sustainable retail economy for the District, two key principles need to be established, namely:

1. Sustainability is central - retailing must be economically, socially and environmentally sustainable in order to be successful.

2. Enhance the experience - the quality of the public realm and the vibrancy of centres must combine to create an enjoyable experience to which customers wish to return again and again, and which therefore retailers are confident of investing in.

It is also important to seek to achieve the following objectives:

- Recognise behaviour as a key factor – shoppers want to move in circuits and finish where they started, therefore primary retail provision should be provided along such routes.
- Get the mix right – vibrant centres need a mix of independent and multiple retailers, and there should be a good mix of other activities, for example, leisure, services, employment and residential uses.
- Match sizes and types – the dimensions of shop units need to be appropriate to the users.
- Make it easy – accessibility should be paramount – customers should be able to arrive straight into the centre and get picked up from there – public transport networks must service the prime retail areas directly.
- Ensure a distinctive identity with a clarity of function and role for each of the centres.

5.2 Roles and responsibilities

Retail investment is largely provided by the private sector. The private sector also, on the whole, runs retail operations. This Strategy seeks to support these private sector endeavours for the benefit of the District as a whole.

Local authorities and their partners have a significant role to play in achieving the changes required. Bath and North East Somerset District Council will help to shape the future of retailing in the District through:

- Providing better access to information and advice.
- Creating the right environment for investment and retail activity.
- Managing and promoting retail centres.
- Planning for and stimulating new development.

Homewares retail in Bath

5.3 District-wide proposals

The established retail hierarchy within Bath and North East Somerset should be retained. There will be a need to consider the relationship of proposed urban extensions to existing centres and whether any new centres are required, once the scale and locations for the extensions is finalised. The centre specific elements of this strategy seek to ensure that an appropriate balance of provision is made across the district to meet community needs and reduce the need to travel whilst recognising the reality of shopping patterns and the role of the higher order centres.

5.3.1 Establishment of good town and city management: such a service should ensure a co-ordinated approach to the management of retail centres across the District:

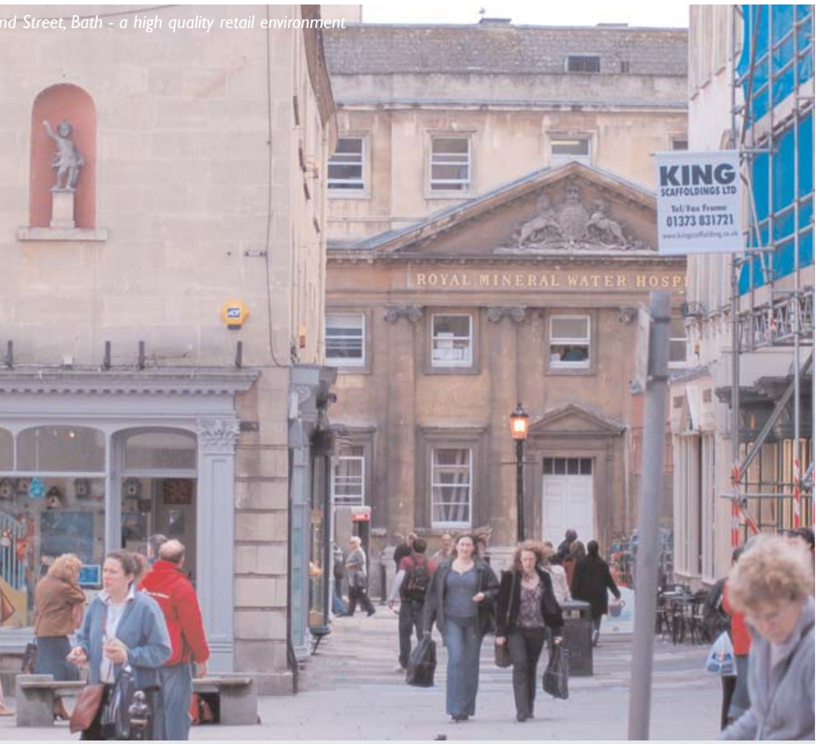
- Clear arrangements for managing the City and towns - the management role should engage stakeholders and address both care and repair issues as well as promotional activity. Progress has been made through the establishment of the Future Bath Plus company and the appointment of a Bath City Centre manager. Management arrangements for the market towns need to be defined. A key task would be to ensure link up with overall destination marketing to establish shopping as a key part of the visitor offer. As part of centre management, support in co-ordinating local markets could be provided alongside piloting extended opening hours in the main centres.

5.3.2 Positive planning: Development is a key area of activity for meeting strategy objectives. To bring forward development of the right type requires positive planning frameworks which are currently lacking for each of the main centres. The Future for Bath and North East Somerset work has begun to set out a proposition for these centres. As a broad district-wide principle it is important that, through the Local Development Framework, area frameworks and site briefs should be prepared to provide a greater degree of certainty and help bring forward the required development.

5.3.3 Retail investment panel: Retailing is a highly competitive and dynamic sector. The aim is to achieve exemplary retail provision in Bath and North East Somerset. To help inform planning, investment and management through leading edge knowledge and thinking, it is proposed that consideration is given to establishment of a retail investment panel. It would complement and assist the roles of existing players. The intention would be to bring together a panel comprising people from the private and public sectors to help direct retail provision across the district. Its purpose would be to attract the right investment through providing advice and challenge in relation to targeting retail operators to help achieve an optimum offer in the centres. It should comprise people with good knowledge and a strong track record in the retail sector. This should include local knowledge. The panel could be called upon as required to assist at key stages in relation to planning, investment and management with an annual workshop to review retail provision in Bath and North East Somerset.

Specialist food retail in Bath

Retail property information is already available through the West of England website www.investwest.org. Consideration should be given to strengthening the promotion of retail investment opportunties, possibly through a local website or web pages linked to the West of England site.



nd Street, Bath - a high quality retail environment

5.3.4 Independent retail encouragement: encourage and expand independent retailing generally with a focus on Bath and promoting opportunities within the wider District:

- Provide access to information and advice to support small and independent retailers. The Council should seek to establish, through its current business support partner organisations, an easily accessible retail information and advice service. Information such as catchment profiling, footfall data, marketing and promotion guidance, contacts for funding and networks of local suppliers and retailers could be provided to all local retailers as appropriate. Advice on setting up transactional websites linked to a central portal website could also be investigated. In addition, advice on business management could be offered. Such a service could operate through the existing business support arrangements, working closely with City and town centre management. A town centre web ring could be established to provide a networked link between independent retailers.
- Provide incubation opportunities for new ventures through the provision of market stalls in each of the main centres.
- Reduce business costs – promote the business rate relief already available (subject to certain limits and criteria) with a target for 70% take up by 2011.
- Make the independent offer central to promotion of retail centres and use promotional activity to help boost footfall - through town centre management initiatives there is an opportunity to promote the distinctiveness that independents provide. Events and promotional activity in the centres should also be planned and managed to help increase footfall for independent shops.
- Engage with major convenience retail operators - the long run trend towards larger retailers has had significant impacts on the independent sector. However, it is in the interests of all retailers that Bath and North East Somerset has a diverse and thriving mix of retailers. In North America there are examples of hybrid models with a degree of community ownership of supermarkets. The major retailers, particularly food superstores, should therefore be engaged to explore the potential for supporting independent shops through measures such as mentoring, joint purchasing of supplies and local community input into decisions that affect the local area.
- Skills development - support for the development of retail skills is particularly important to independent shops which do not have the training resources and systems of large retailers. See paragraph 5.3.5 below.

5.3.5 Retail skills
A thriving retail sector needs access to people with the right skills. Linked to this, customer service is an important feature in peoples' overall experience of retail centres. Also, good skills are important to the success of individual retail businesses. The Council should therefore work

with a range of partners, including 'skillsmart retail' (Retail Sector Skills Council) and local colleges to develop retail skills in the area.

5.3.6 Support local product supply chains - by building on current 'Foodlinks' work to identify local suppliers and opportunities for linking these to local retail opportunities.

5.3.7 Review floorspace forecasts regularly and update this strategy, adjusting it to keep the long term goal in sight.

5.3.8 Develop a database of retailers and trade organisations as a basis for developing communication networks and disseminating information and best practice. Research underpinning this strategy has consulted with existing and potential retailers regarding their aspirations. These findings will help inform the database, but a more detailed survey to populate the database could help indicate retailers' particular interest areas and requirements over the forecast period.

5.3.9 Developer contributions - secure funding to encourage independent retailers and development of community enterprises through developer contributions related to major developments. A policy basis for this should be established on the principle of ensuring sustainable communities. Encouragement could include funding for public realm improvements, shopfront enhancement, specialist retail business advice etc.

5.3.10 Monitor change - establish a framework of indicators to monitor the development and performance of the retail sector and the main centres. PPS 6 advises that local authorities should regularly collect information, preferably in co-operation with the private sector, on the following key indicators:

- Diversity of main town centre uses (by number, type and amount of floorspace).
- The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations.
- The potential capacity for growth or change of centres in the network.
- Retailer representation and intentions to change representation.
- Shopping rents.
- Proportion of vacant street level property.
- Commercial yields on non-domestic property (ie the capital value in relation to the expected market rental).
- Pedestrian flows (footfall).
- Accessibility.
- Customer and residents' views and behaviour.
- Perception of safety and occurrence of crime.
- State of the town centre environmental quality.

The Council should work with partner business organisations to investigate the feasibility of establishing a turnover index for each centre in order to monitor broad trends in retail turnover. Information obtained from monitoring should be linked to the proposed retail information service under the section on information and advice above.

National retail rankings are often cited when considering the strength of centres across the UK. Whilst these have value, they do not fully reflect the characteristics or offer of cities such as Bath. It is recommended therefore that consideration is given to developing a set of indicators that can be used to benchmark Bath against similar towns and cities.


Stall Street, Bath

Location specific strategies

Rural areas

Around a third of the District's population live in rural areas. These locations comprise a diverse landscape, much of which is designated for its quality.

The district and villages centres contained within these rural areas, such as Peasedown St John and Paulton, play a valuable role in providing local convenience and top-up shopping. Services within these centres, such as post offices, can also provide valuable social and community benefits.

These centres are essential in helping to reduce the need to travel for shopping trips and are particularly important for residents with limited mobility. It is therefore important to maintain their shopping function and, where possible, to promote investments.

The key elements of the Strategy for rural areas are to:

- Provide information and advice to support local retailers.
- Enhance access to Council and other services via rural shops.
- Safeguard rural shops through planning policies.
- Secure funding or support for physical improvements and enhanced services.

RA1. Role

Retail centres within rural areas should continue to provide convenience retail for their local catchment population. They should meet day-to-day needs and services, thereby reducing the need for travel into the district's larger retail centres. Such functions can also provide a hub, strengthening the sense of community. The Council should continue to safeguard rural shops through planning policy and support the conversion of units to retail as appropriate.

RA2. Meeting customer needs

The primary function of retail in the rural areas is convenience. Retail provision in the rural areas should be driven by the need to meet the following demands:

- The need for easy and convenient shopping.
- The need for community hubs.
- The desire for fresh local produce (which can be garnered straight from the surrounding landscape).

There is an important opportunity for local produce to form part of the offer within rural areas, with the benefit of supporting local agriculture. Specific farm produce outlets

Convenience retail in Peasedown

Peasedown News

should be encouraged and supported within rural settlements or at key cluster points between farms. In addition, shop owners could be provided with advice (see below) on reviewing opening hours of shops in rural areas towards accommodating the demands of the local population.

The Council should also consider providing access to Council and other service provider information and services through rural shops to support them as community hubs.

RA3. Creating the conditions for success

Retail within rural areas will tend to be small in scale, providing for brief stop-off shopping trips. It is recommended that the availability of easy on-street parking is encouraged, in close proximity to retail functions as this will be vital to ongoing success in these locations. The following factors will be important in establishing the conditions for success:

- Recognising the need for short stay on-street parking, pedestrian and cycle routes and providing for this.
- Investigating partnerships to support key local shops.
- Providing access to retailer guidance and advice to support local retailers' endeavours.

The Council should seek developer contributions to provide physical improvements to rural centres.

RA4. Management and information

To best support rural retailing there is a need to understand what is working and what is not across the District and beyond. A number of innovative examples exist both within the District's villages and elsewhere and the lessons should be transferred to support rural activities across the piece. Sharing knowledge on business approaches including partnerships and revised opening hours will be central to this.

The Council should provide information and advice on local suppliers and disseminate good practice as part of District-wide proposals for a retail information and advice service. This should include signposting to specialist sources of advice such as the Village Retail Services Association. Bowden's of Harptree is a good example of successful rural retailing in the district. The shop opens from 7am to 7.30pm Monday to Saturday and from 8am to 6pm on Sunday and has extended its offer and services to meet local demands.

Community ownership and management of local shops should be encouraged. Advice and information on models and successes achieved elsewhere should be provided to retailers.

The potential for supermarkets to support rural shops through advice and the provision of subsidised supplies should also be investigated.

Mapping and auditing the relative viability and vitality of rural centres will provide a useful tool in monitoring and steering progress.


Chew Magna village centre


Chew Magna Post Office

West Harptree Stores

Market towns - Keynsham

Keynsham has the potential to be an attractive focal point serving the local community as a 21st Century market town. At present it is losing convenience expenditure to competing centres, such as Longwell Green, and this needs to be reversed. Its environment is compromised by poor quality modern development, traffic and poor pedestrian links to the car parks and park. As a result, the experience of the town centre tends toward the functional rather than a place to enjoy.

The key elements of the Strategy for Keynsham are to:

- Provide clarity over the town's role.
- Ensure effective management of the town centre.
- Prepare a public realm and movement strategy to improve the centre's environment.
- Establish a new food store in the centre.
- Refurbish or redevelop the dated modern shopping centre.
- Develop the distinctiveness of the retail offer by building on the independent sector - Fairtrade, Farmers markets and local supply.

K1. Role

Keynsham has an opportunity to become a 'first choice' local convenience centre; a place where the local population are able to obtain everyday goods - primarily food - without having the need to travel to the larger neighbouring centres.

K2. Meeting customer needs

Keynsham must first and foremost operate as a functional local centre which provides for its hinterland population's needs. A survey of national retailers identified that the prime demand is for convenience goods (five supermarkets are looking for premises in one or other of the market towns in the District).

New development should focus on establishing a good quality and varied food offer which reflects residents' needs. This will encompass both a new foodstore as well as an improved market offer and independent food retailers.

Keynsham already provides a good number of services, which sets a context for its role as a key local centre. Some uses where there is an opportunity to develop representation are:

- Convenience goods, such as food and household products.
- Basic comparison goods, such as inexpensive electrical goods, gardening products and housewares.

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...am Church

Keynsham High Street

The Centre, Riverside

- Catering outlets, both during the day and the evening, meeting the needs of the catchment profile and, in particular, families.

K3. Creating the conditions for success

Keynsham is a busy retail centre with great potential, although it is currently dominated by poor quality public realm and architecture. There are two core elements of the Strategy to address this context:

1. A public realm and movement strategy should be established to guide improvements.
2. In addition, a greater clarity should be developed over the focus and arrangements for managing the town centre to ensure it flourishes and attracts people in.

With respect to the proposed public realm and movement strategy a number of specific opportunities exist to create a more inviting environment for shoppers, and these are set out below and should be part of the Strategy.

Improve access to town centre car parks

Keynsham benefits from the presence of a very large public car park, in close proximity to the High Street, along Ashton Way. At present however, the access route between the car park and the town centre is poor and consists of an uninviting alleyway, situated between two retail units. Access between the town centre and adjacent car parks should be improved in the following ways:

- Improve the environment within the existing access way through lighting, paving and public art.
- Introduce activity along or around the existing access way, such as art work, temporary small-scale retail units or stalls.
- Improve the environment at both the north and south edges of the 'Ashton Way block', to encourage pedestrians to enter the car park from a greater variety of locations.
- In order to enhance the retail circuit and movement, seek opportunities to provide new access ways and to widen the existing alleyway.

Enhance the town square

The town square, whilst well-maintained, is currently underused partly due to its location, which is disconnected from the primary pedestrian routes. The shops adjacent to the square do not have sufficient 'pull' to attract pedestrians into the space. Redevelopment of the square should be a priority (refer to p.25), however, if redevelopment is not feasible within the medium term, the opportunity exists to make much better use of this space and there are a number of ways in which this could be achieved, including:

- Pedestrian crossing facilities across the junction of the High Street and Bath Hill could be improved to enable shoppers within Keynsham

n Road car park

Pedestrian link to Ashton Way car park to access the space;

- Existing retail units alongside the town square could be refurbished to create an enhanced setting for the space.
- Activities, potentially in coordination with the adjacent Library, could be encouraged within the space to enliven the area and provide it with a greater sense of character and purpose.

Improve access to open spaces

Keynsham benefits from the presence of highly attractive public open spaces, in very close proximity to the town centre. At present, however, the open space is largely underused and, in many ways, the town turns its back on this area as large-scale new development, poor signage and lack of clear routes constrain access for pedestrians. The open space has the potential to make a significant contribution to Keynsham, providing a space for shoppers to relax, have lunch and to combine leisure activities as part of a shopping trip. This could be achieved in the following ways:

- Improve the existing access way to the north of the High Street, adjacent to the tennis courts, through improved signage, lighting and public realm enhancements.
- Provide a new access way as part of a major redevelopment scheme of the Centre / Riverside site (see p.25).
- Introduce a coordinated signage strategy throughout the town centre.
- Enhance the lighting on routes between the High Street and the river and where possible widen these routes to encourage their use.

Enhance pavements and pedestrian crossings

The shopping environment in Keynsham is significantly compromised by the poor pedestrian environment and presence of traffic moving through the centre. Whilst the options for traffic re-routes and network changes are outside the scope of this study, it is recognised that smaller-scale public realm enhancements could be achieved to improve the environment for pedestrians.

These improvements could consist of:

- Seeking opportunities to widen pedestrian footpaths and improve paving.
- Seeking opportunities to provide new pedestrian crossings, particularly in-line with access ways to car parks, green spaces and towards the town square. This could enable far greater pedestrian movement around the town centre, rather than merely up and down the High Street.


Keynsham riverside

- Ensuring access for all by providing level access along the High Street and into shops.
- The potential to re-route traffic away from the High Street along Ashton Way should be considered.

A common design style
A common design style should be established for public realm improvements with high quality materials.

Create a more consistent streetscape
As a general rule there is a need to enhance the quality of shopfronts along the High Street. Opportunities to enhance the quality and consistency of facades should be encouraged.

More recent development along the High Street in Keynsham has tended to create a new building line, set back from the more traditional frontage onto the High Street. This creates an uneven frontage and detracts from the character of the town centre.


Keynsham High Street

Furthermore, the set-back development creates small areas of dead frontage, which have an untidy appearance.

The historic building line was once further set back. In the longer term, partial set back at a key location through redevelopment of one or two units could create a new space on the High Street. Elsewhere the set back should be reduced to establish a consistent line.

K4. Management and information

In performing the role of a local convenience centre, Keynsham's status is set to grow. Keynsham must focus on serving its (growing) local catchment in the most effective way possible. This role could build upon its status as a fairtrade town and efforts could be made to incorporate local produce within the town centre, through enhanced market activity.

To increase footfall and the vitality of the centre, attractions that add to and support the retail offer are important. The Farmers' Market has a key role to play in this respect and should seek to increase in frequency over the long term within a business plan to ensure that both vitality and viability is retained. A programme of other activities such as street entertainment and small scale events should also be considered.

With respect to the proposal to support strong town centre management in Keynsham, there are a number of action points. Town centre management should continue the good work of establishing market activities and retailer engagement. This role should be increased to encompass care and repair issues in the town centre as well as promotional activity (building on the Fairtrade branding status). The role should build on the established partnership working arrangements

Keynsham retail offer

and provide information and advice as part of the District-wide proposal for dissemination.

Specific opportunities which exist include enhancing the quality of shopfronts. Improvements could be encouraged and funded through developer contributions or when High Street buildings change use. An event or demonstration project could provide a useful catalyst to promote good practice and practical advice.

K5. Development

Redevelopment is a key requirement if Keynsham is to fulfill its potential in serving the local community. The catchment population of Keynsham could grow significantly over the strategy period with proposals for urban extensions, albeit not currently agreed, to address the need for housing. Keynsham's role and capacity for floorspace may therefore rise. Any additional development beyond the floorspace capacity outlined should be considered cautiously to ensure Keynsham maintains its clear role.

Scenario 2 (see p.10) is considered the best forecast for Keynsham. This forecast assumes housing and population growth in and around Keynsham. The demand for floorspace over the strategy period indicates that around 3,100 sq m net of convenience goods floorspace could be required by 2026 and 9,700 sq m net of comparison goods floorspace.

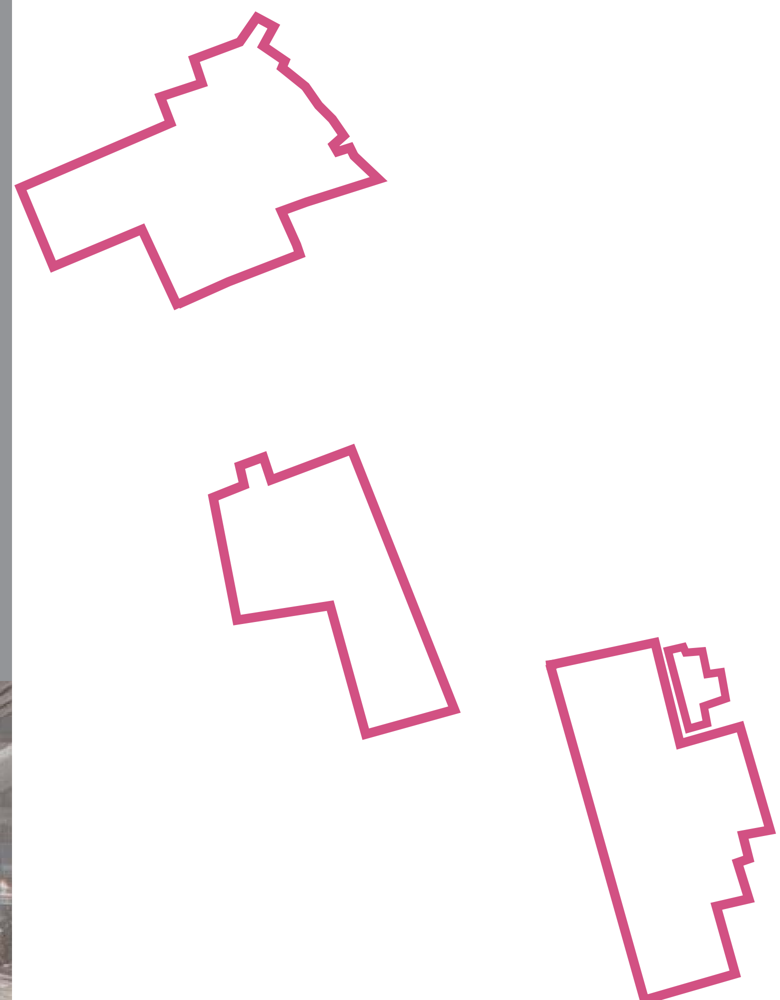
This presents opportunities to strengthen the High Street with new development. The prime opportunities for such interventions are at either end of the High Street, to provide anchors at the northern and southern points and support linear and circular movement. These opportunities are explored on the facing page.

In addition, part of the Ashton Way car park could be considered for development to help accommodate future needs for retail floorspace, subject to the need to ensure adequate parking provision for the town.

This would help support the middle section of the High Street and could potentially create a retail circuit between the High Street and Ashton Way. The links between the High Street and Ashton Way, however, would need to be strengthened to enable this opportunity to be taken forward.

Keynsham retail service provision


Keynsham High Street



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OPPORTUNITY SITE

Charlton Road / St John's Court

The car park off Charlton Road to the north east of the High Street is allocated in the Local Plan for a foodstore. It is subject to a landowner's agreement with the Council. The convenience capacity forecast indicates the potential for a new food store. Such an addition would strengthen the in-town convenience offer and re-inforce Keynsham as a community focus in advance of adjacent population growth.

To ensure the development of this site has maximum benefit for the town centre it is essential that the foodstore has some degree of presence or linkage to the High Street itself. Without such a link the store would be likely to operate in separation from the High Street and not fulfill the vital anchoring role required at this end of the High Street. Associated with this link, some small scale comparison floorspace could be provided to meet some of the demand forecast in the next 10 years.

It should be noted that the site falls in a Conservation Area and any development will therefore need to respect the character and setting of the Conservation Area.

As long stay parking spaces would be lost on the site, there is a need to manage parking provision for the benefit of the town centre as a whole, and re-provision should be considered in this light.

OPPORTUNITY SITE

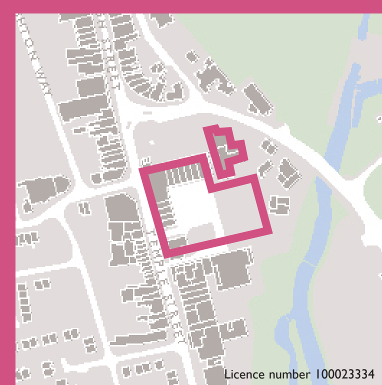
The Centre, Riverside

At the southern end of the High Street are two sites adjacent to one another - The Centre, a 1960s development comprising retail units, the town hall, library, a town square and rear servicing and parking. Riverside comprises a large and unattractive office block, the leisure centre, some ground floor retail units and a car park. The nature of these developments is not conducive to pedestrian movement, a sense of place or civic life. The physical form is a constraint on retail activity and the vitality of the town centre.

Future retail provision in this area is of crucial importance in order to balance the proposed foodstore development at Charlton Road to ensure strong anchors at either end of the High Street.

A comprehensive redevelopment of both The Centre and Riverside would maximise flexibility in restructuring this key part of the town centre. However, this may not be feasible. In terms of retail provision The Centre must be the priority given its location and the current use compared to the primary non-retail use and peripheral location of Riverside.

It is recommended that a development framework for the town centre should be established. This should incorporate a development brief for these two sites setting out the need to accommodate a public space which can provide space for activities including a market, development with ground floor retail and complementary uses (e.g. restaurant) as well as connections to the river and parking.



Redevelopment should seek to achieve a significant net addition in floorspace to help meet the Scenario 2 growth requirements (see p.10-12). There should be a mix of unit sizes to accommodate both some High Street names and independent retailers.

There would be potential to include some catering outlets as part of the development making best use of the river aspect. Office space, or if not viable, residential space, should be provided to support the town's daytime retail economy.

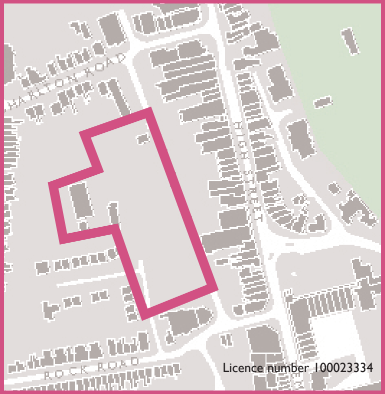
OPPORTUNITY SITE

Ashton Way car park and adjoining land

Ashton Way car park is a vital facility for the town centre and the adjoining land accommodates a 'Scout Hut' which is an important community facility. However, given the forecast need for additional retail floorspace and the aim of accommodating this in the centre rather than at out of town sites, future redevelopment should be considered as a long term option, following review of the forecasts of additional retail need.

Any redevelopment should seek to make more efficient use of the site through a mix of uses. parking provision would need to be retained (basement) or replaced, as would the community facility. The rear areas of current high street properties backing onto Ashton Way would need to be improved.

A brief for the site should be established within an overall development framework for the site as recommended in relation to the opportunity site at Charlton Road.



Keynsham High Street

Keynsham High Street

Market towns - Midsomer Norton

Midsomer Norton is a fundamentally attractive town centre, to the south of the district, which is situated adjacent to the market town of Radstock. The immediate urban area has a population of 21,000 and is the larger of the two settlements. Their combined population catchment is around 40,000.

The retail environment within Midsomer Norton has great potential with a unique waterfront setting as the River Somer passes through the town centre. At present however, the dominance of parking in the streetscene, poor pedestrian links and a lack of public space means the overall quality of public realm is poor. The town centre has suffered from a lack of investment, and that which has taken place, with a number of exceptions, has lacked quality and consistency, both in terms of private and public sector investment. Midsomer Norton generally lacks the quality to attract investment and encourage shoppers to linger in the centre although its townscape setting is potentially highly attractive. A higher quality environment is required to secure retail investment and activity.

The need for modest increases in floorspace is forecast for Midsomer Norton. The focus should be on unlocking the limited town centre opportunity sites to avoid the need for out of centre retail development. Effective management and promotion of the centre will be vital to its future success.

River Somer

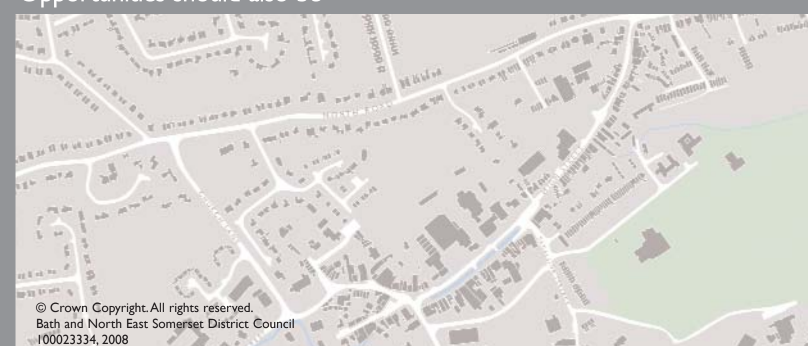
The key elements of the Strategy for Midsomer Norton are to:

- Produce a public realm and movement strategy for the town centre (encompassing links to Radstock).
- Extend the comparison offer.
- Establish a development framework and detailed site briefs to guide development.
- Encourage more catering outlets and highlight opportunities for outdoor tables and chairs.
- Develop distinctiveness of the retail offer building on the independent sector, Fairtrade, Farmers' Market and local supply.
- Ensure effective town centre management.

M1. Role

Midsomer Norton has the potential to enhance its role as a key centre in the south of the District. It should develop as a 21st century market town. To be attractive to its full potential catchment population, incorporating the surrounding villages, the centre must provide for a greater range of demands and activities. In particular, there is a scarcity of cafés and restaurants which could help to turn around the negative reputation it has in the evening.

Competition from nearby towns outside the District which have benefited from investment indicates the importance of change. Opportunities should also be sought to link Midsomer Norton and Radstock more closely. This could be achieved in a physical sense by strengthening the green links between the two centres via a cycle and walking link along the route of the former railway as part of the Town Park proposal. This would enhance opportunities for sustainable travel to retail facilities in both centres. From a retail point of view, the two centres could potentially be linked through complementary uses which encourage local residents to use both centres as part of a single shopping trip.



Additional community facilities could be provided taking in the needs of both settlements to support their joint role.

M2. Meeting customer needs

Midsomer Norton is characterised by independent shops. There has however, been some investment by high street multiples over recent years. Whilst the size of the centre and its catchment is a constraint, there is potential for a modest increase in 'high street names' to help strengthen the centre and support the independents. Action identified below (see M3) in respect of creating the conditions for success, management and information and development will be vital to achieving this sort of investment.

Modest amounts of new floorspace will be required and every effort should be made to accommodate this in the town centre.

There is an opportunity to provide better facilities for families and children in the town centre (see M3 and M4).

Links between local food suppliers and the catering offer in Midsomer Norton should also be established and strengthened. These links should also be made between local food supplies and retailers in order to develop and support the Farmers' Market. This could generate a genuine character to the experience of dining within the town centre.

There is potential in Midsomer Norton to establish more catering outlets. Such a move would encourage more of the resident population into the town and increase visitor's dwell time. Such activity would support provision for families.

The High Street benefits from reduced traffic and therefore the use of pavements or outdoor space would be easily facilitated and would be attractive to customers.

There is little identified demand from national catering operators. The emphasis should be on independent cafés and restaurants, building on the examples that have opened in the town over recent years.

The wider catering offer in the area should be promoted alongside that in the town centre, creating a complete identity which encompasses restaurants and outlets in the countryside.

M3. Creating conditions for success

The public realm in Midsomer Norton is weak. In particular, the unique asset of the River Somer running adjacent to the High Street is not capitalised upon and could be significantly enhanced. Midsomer Norton certainly has the potential to accommodate a greater variety of outside eating establishments and there are opportunities to enhance pedestrian movement in the centre to improve the retail environment for shoppers.

A co-ordinated public realm and movement strategy and associated investment plan are required to dramatically improve the centre's quality and image.

The following objectives will be key to the future vitality of the town:

Enhance the water as a unique selling point for the town
Environmental management measures should be introduced to improve the River Somer, providing an opportunity for it to be activated in the following ways:

- The introduction of market trading along the road edge adjacent to the river.
- The establishment of cafés and eateries with outside seating adjacent to the river.
- The creation of new landscape and planting to support the river habitat and provide an enhanced setting.
- Enhanced lighting of the public realm.


River Somer


Triangle at western end of High Street


High Street frontages

Improve public space at key foci

At the western end of the High Street, The Island is currently used for parking and bus waiting, with a carriageway running through the centre. The site presents an opportunity for a greater variety of uses should removal of some or all of the car parking provision prove feasible.

Options could include the creation of a pedestrian priority space. The space could house a regular cluster of market stalls, or could equally be a location for café space with outdoor seating. Other sites for improvements include the junction between Excelsior Terrace and the High Street.

CASE STUDY:
Wells town centre, which is a competitor for Midsomer Norton, has recently undergone significant public realm enhancements as part of a major framework of changes. This has dramatically enhanced the pedestrian space available and had a significant influence on investment in retailing, cafés and restaurants. This has created a much greater attraction to the town centre as a whole. Midsomer Norton could follow a similar series of enhancements with the same outcomes and benefits.

Establish high quality links to car parks

Current links between shoppers car parks and the High Street are poor, most notably from the south side of the High Street. The enhancement of existing routes could significantly improve the arrival and overall shopping experience. In addition, new access routes should be provided as part of any future redevelopment schemes to the south of the High Street.

Enhance the quality of shopfronts

Opportunities exist throughout the town centre to improve shop fronts. In some cases this may be a focus on heritage restoration of the façade fabric and style. In other cases, a management led initiative may help to overcome the need for heavy duty shutters or encourage the improvement of window displays. The latter is likely to be achieved by talking to shop owners and understanding their skill sets or liability constraints. The former would require a collective approach or event with a group of shop owners and stakeholders including insurers to achieve physical change. There is potential to link the funding of such improvements to developer contributions as part of the District-wide proposals suggested.

Sainsburys

Palladium / Helibeds opportunity

Street café in Midsomer Norton

Existing pedestrian link to southern car parks

etail units in western part of the town centre

M4. Management and information

Independent and small traders should be supported generally in the town. Information and advice as part of the District-wide proposal will provide much of this support. In addition, greater clarity on the focus and arrangements for managing the town centre is required. This should cover both care and repair issues and promotional activities. It should engage local stakeholders through established partnership working arrangements and link with the District-wide proposed actions in relation to the provision of information and advice to businesses. To boost footfall and the vitality of the centre, attractions that add to and support the retail offer are important. The Farmers' Market has a key role to play in this respect and should seek to increase in frequency over the long term within a business plan to ensure that viability is retained. A programme of other activities such as street entertainment and small scale events should also be considered. The aim should be for a well cared for centre with a clear strategy for developing and promoting its offer and a single point of contact for the town's retailers.

M5. Development

Some new development is required if Midsomer Norton is to fulfill its potential in serving the local community. The demand for floorspace over the strategy period indicates that around 1,300 sq m net of convenience goods floorspace could be required by 2026 and 3,100 sq m net of comparison goods floorspace.

This presents opportunities to strengthen the High Street with new development. The prime opportunities for such interventions are at the mid point of the High Street to the north and south side. A development framework incorporating detailed site briefs is required. From this, the assembly of key sites can take place to market investment opportunities to meet gaps in provision.

OPPORTUNITY SITES

North side of the High Street

The large retail units on the north side of the High Street, comprising Sainsbury's, Mackay & Co, Argos and Lidl, detract from the more intimate character of the rest of the High Street. They do, however, provide an important function of keeping convenience and the larger scale comparison shopping in the town centre. The relationship between these units and the High Street should be maximised.

For example, an extension of retail activity to the Sainsbury's colonnaded facade would allow it to better address the High Street. Alternatively, expanding the farmer's market activities outside Sainsbury's could provide the active frontage required.

South side of the High Street

On the south of the High Street one key site offers a significant opportunity - that of the Palladium and adjacent sites at 111 and 112 High Street. Plans are currently being developed by the Palladium landowner to develop the Palladium site and therefore steering this development would be a short term action.

The Palladium site offers the opportunity to create a new link between South Road (and the associated car park) and the High Street. It is recommended that a planning framework is established to steer development on this site.

Longer term non-retail opportunities for partially redeveloping the South Road car park should be explored to support activity and pedestrian flow (subject to ensuring continued provision of adequate car parking).

Market towns - Radstock

Radstock provides a very small local needs driven retail offer and is dominated heavily by the large in-town Radstock Co-operative supermarket. Radstock has a strong relationship to Midsomer Norton and needs a more defined role and cohesive centre to secure long term sustainability.

The presence of a store of Radstock Co-operative's size within such a small centre has created a very uneven town centre retail offer. In fact, the rest of the town centre has less than 40 units in total.

Despite the reasonable variety of retailers, Radstock lacks any sense of critical mass in retail terms. The lack of any strong sense of place in Radstock is further generated by the street network, whereby the town is situated at the meeting point of a number of busy roads, compromising the pedestrian environment. At the same time Radstock has a beautiful historic setting which is enhanced by the topography of the town and its rich history as well as excellent landscape and shopfront improvement.

R1. Role

Radstock should establish itself clearly as a convenient small local centre, supplying day to day needs and complementing the adjacent town centre within Midsomer Norton. As such, retail facilities in Radstock should primarily service its immediate residents and rural hinterland population. In addition, however, the town's role as a visitor stop off should be further exploited and supported through retail service provision.

R2. Meeting customer needs

A modest potential has been identified for additional comparison goods floorspace. There is an opportunity to both meet local needs and build upon the independence and character of Radstock through retail provision related to the town's potential as a focal point for the local community, visitors, the national cycle route and arts activity. This could take the form of café / restaurant provision, cycle hire, retailing of artists' work and provision of community facilities and information. Re-use of existing buildings and new development should explore this potential demand.

Radstock Museum

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100023334, 2008

Sites for such an offer could potentially be found on the former railway land planned for redevelopment. A focus on establishing a strong unique selling point of this nature for the town within the wider joint town function will be key to its success. The potential of the local arts and community activities could complement and support this retail opportunity.

R3. Creating conditions for success

Radstock is a highly fragmented town centre due to the dominant highway network which effectively splits the centre into two halves. The presence of a major traffic junction at the centre of the town also restricts pedestrian movement and reduces any sense of place in the town. A number of opportunities exist, however to enhance the town centre, both in terms of the built environment and the public realm.

Manage and maintain the existing environmental assets

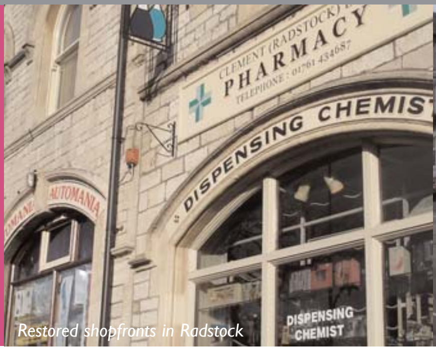
Positive elements of the existing environment of the town centre should be protected and enhanced. The green quality of the centre associated with the river should be supported, particularly as these assets help to counterbalance the negative impact of the traffic. In addition, the shopfronts which were recently restored must be maintained as they provide a strong sense of character to the centre's retail core.

Enhance the pedestrian environment

Greater accommodation of pedestrians (and cyclists) should be established in the centre through a public realm and movement strategy. Key features of the strategy should be to reduce the extent of tarmac and increase pedestrian space. Where wider pavements are appropriate they should be secured. Any opportunities to re-route traffic to reduce the severance experienced would also benefit the retail experience by creating a more integrated core area. While high traffic volumes are a significant constraint, a priority should be to create a town centre environment through which traffic passes rather than an environment which feels dominated by highways.

R4. Management and information

Clear town centre management arrangements should be established to support the development of Radstock's role, as part of the management proposals for Midsomer Norton. Information and advice to retailers should be provided through this role and promotional activities should be investigated. Linking into wider tourism and destination management will be important, as will ensuring the convenience retail offer continues to be provided by a balance of independent and multiple retailers, building on the status of the Radstock Co-operative store.



Restored shopfronts in Radstock

Existing visitor offer of Radstock


Key route creates segregation in Radstock

R4. Development

Whilst Radstock is a small centre, some redevelopment is required in order to address structural issues that prevent the town from fulfilling its potential in serving the local community and in association, to enhance the retail offer.

It is considered that in the south of the District the best approach is to firstly support Midsomer Norton and to accommodate the forecast convenience retail demand for retail floorspace in the town centre as appropriate. That demand which cannot be accommodated could be considered for Radstock.

Without an increase in the market share of convenience goods expenditure attracted from the catchment area, it is not possible to identify capacity for additional food store floorspace throughout the forecasting period. However, this should not preclude modernisation of the Radstock Co-operative store, or its replacement by a large modern supermarket, so as to improve the retail attractions in this Local Centre. A replacement supermarket for the Radstock Co-operative store will need, and be likely to attract higher market shares from the surrounding area, particularly from the out-of-centre Tesco store at Midsomer Norton. Based on this assumption, the demand for floorspace over the strategy period indicates that around 2,600 sq m net of convenience goods floorspace will be required by 2026 and 2,250 sq m net of comparison goods floorspace in Radstock.

The Radstock Co-operative site presents a significant opportunity to enhance the town centre. In addition, new development on the former railway land in the south eastern part of the town will establish new links into the town centre offering opportunities for enhancement. The two key opportunity sites are the former railway land and the site of the Radstock Co-operative superstore. In the longer term, consideration should be given to redevelopment of the unattractive modern blocks on Fortescue Road to provide a higher quality street frontage, retaining a range of small-medium ground floor retail units.

OPPORTUNITY SITES

A co-operative and integrated Radstock Store

The bulky mass that the Radstock Co-operative store currently forms should be broken up to establish an urban grain more in keeping with the town. Development of the site should provide a good quality, fit for purpose modern store as part of a mixed use scheme. The layout of new development on the Radstock Co-operative site could take a variety of forms but should be related to the existing town centre and provide active frontage on to the street. This could either be with an entrance and façade on to the street or with a setback to create a local square with active edges. The alternative of consolidating the store within a smaller footprint on an alternative more central site would be preferable and should be considered to help integrate and strengthen the centre.

Consideration should be given to accommodating some of the uses within the current store (e.g. Post Office, travel agent) in small units to strengthen the character of the town as a local centre with a mix of small shops.

Integrated growth

The Norton Radstock Regeneration Company have set out a vision for the south western growth of the town along the river. It involves the creation of an urban framework that will allow the town to evolve in the future. The vision is underpinned by the premise that if an attractive network of streets and spaces connecting all parts of the town can be created the town will be able to exploit the natural advantages of its location and develop as a great place to live. A key change is the proposed realignment of Frome Road to its original route via Victoria Square to create a new High Street. This strategy supports this proposal given the benefits it will bring to the centre. Any developent of a new store on the Radstock Co-operative site should explore the potential that this might provide for better integrating the store with the centre.

The opportunity to enhance the retail offer afforded by this change and associated approved development could be instrumental in supporting the cohesion of the town centre. A mix of the forecast comparison and some convenience floorspace in small and medium units could be accommodated through this and would be supported by the influx of new residents living within the town centre. Such a move would strengthen the heart of the town. It is recommended that a planning framework is established for the town centre to steer the development of key sites in the future. The potential for realising the opportunities identified in the Meeting Customer Needs section should be explored as part of this framework.

Following the development of these two major sites a review of the forecast expenditure and future floorspace needs should be undertaken.

City of Bath

City of Bath - Overview

Introduction

Bath is the main retail destination in the District. Bath comprises both the City Centre which is the prime focus of retail activity, as well as the much smaller centres in outer Bath which serve the local neighbourhoods.

The City of Bath as a whole must function for both local residents and visitors - meeting the needs and demands of both.

Overarching strategy

There are four main components to the strategy for the City of Bath:

- Accommodating forecast growth for retail.
- Enhancing and developing the city centre as the primary retail location.
- Ensuring a network of smaller centres in outer Bath to support the City Centre and provide a sustainable pattern of retail provision.
- An approach to non-city centre retail formats.

The priority location for new retail floorspace is the City Centre. Accommodation of forecast growth is therefore initially considered under the City Centre heading.

Bath postcards

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Bath City Centre

Context

Bath is a unique, world renowned, major retail centre with over 90,000 sq m of floorspace and over 600 retail and service units. The City Centre has built a strong reputation for its high quality independent retail offer generating a unique character not present in other centres and virtually impossible to recreate elsewhere. Bath also benefits from having one of the strongest historic identities of any international city, both through its handsome, attractive Georgian architecture and its visitor experience, reinforced by the Roman Baths. In this sense, Bath's distinctiveness and quality are features running through all aspects of the Future for Bath and they are key underlying principles for this Retail Strategy.

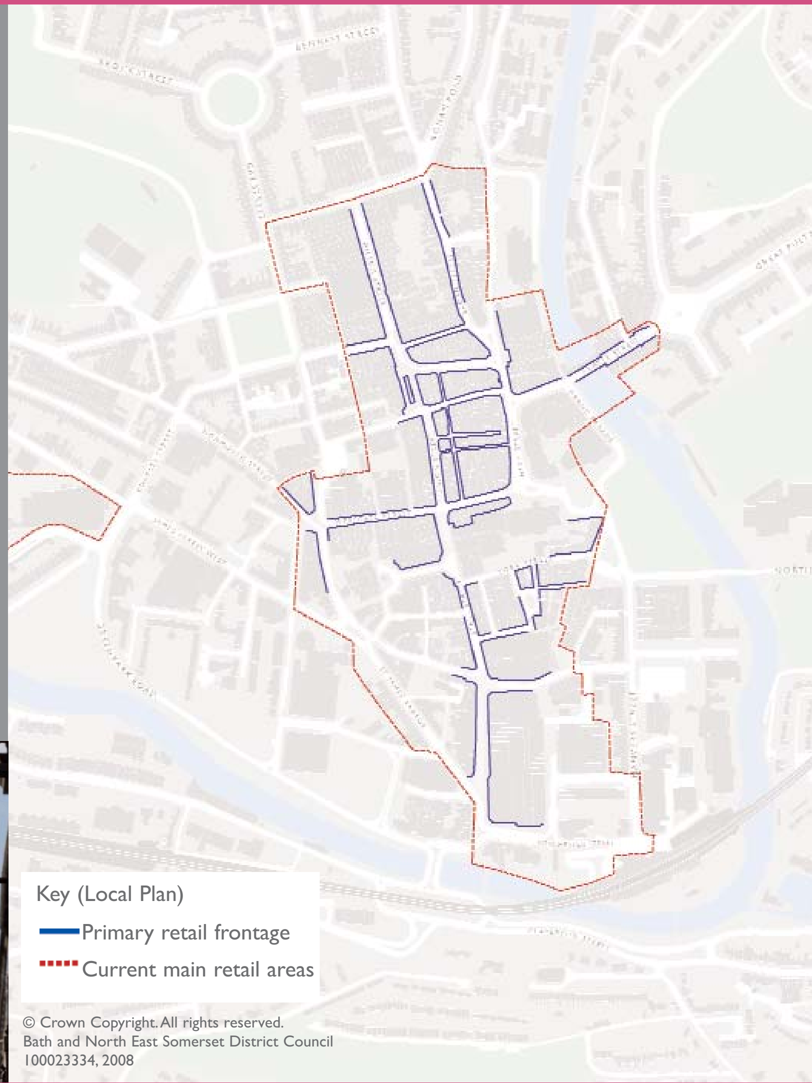
Some of the issues facing Bath include:

- Bath is facing major growth requirements in terms of new jobs, homes and retail space.
- The City is facing competition from other retail centres.
- While Bath is renowned for its exceptional architecture, there are significant areas of poor design and poor quality public realm.
- The City centre suffers from traffic congestion and general pedestrian/vehicle conflict.
- A 'brand image' that is strong on heritage but not on other aspects.

A visit to the shops in Bath represents a different experience to any other retail destination. Bath however, does have a role in providing more traditional mainstream retail, to support its unique offer. The southern part of the City Centre in particular contains a variety of multiple retailers and the new Southgate scheme, which is currently under construction, will provide additional space for such retailers. In terms of retail operators this provision will be similar to that found in nearby centres, such as Bristol (both the city centre and Cribbs Causeway). The retail strategy envisages a vibrant City Centre which becomes a beautiful, high quality retail environment with abundant street cafés and outdoor activity, set within a pedestrian focused environment. The city will be a sustainable retail and mixed

The Pig and Fiddle public house, Bath

Figure 5.2: Main retail area



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use destination, promoting independent retailing, and organic and locally produced goods. Independent and chain retail will combine to create a well rounded city experience, thereby helping to drive the growth of the city centre.

Bath should develop a reputation as a city of innovation in retail, that welcomes and pioneers new concepts. The Retail Investment panel proposed under the district-wide measures could help develop this reputation

Figure 5.2 illustrates the primary shopping area and retail frontage as designated in the Local Plan. The shopping area will need to be expanded westwards to provide greater retail capacity to enable the city to compete more effectively without sacrificing its historic character (see Accommodating Growth section). The public realm will be transformed to be welcoming, safe, clean and inspiring. The retail experience will be unique – a real alternative to bland shopping malls and 'clone' towns. In addition, the small street and alley style shopping experience will be further supported in the area around Milsom Street, Broad Street, Walcot Street, the Cattle Market and the Podium.

The Future for Bath identified the following five themes rooted in Bath's history and reinterpreted for the 21st Century:

- Water and Wellbeing.
- Pleasure and Culture.
- Creativity and Design.
- Knowledge and Innovation.
- Living Heritage.

Each of these themes is relevant to the manner in which the Retail Strategy interprets Bath's retail role, as is meeting the needs of residents. The question for Bath, therefore, is how it should align itself in competition with neighbouring centres and secure greater levels of footfall and high quality retailers. Bath should seek to provide an alternative experience for shoppers and visitors to exploit its competitive advantage in relation to its sense of place. Developing the centre's distinctive niche retail whilst providing a sufficiently rounded offer to meet customer needs and ensure sustainability will be crucial.

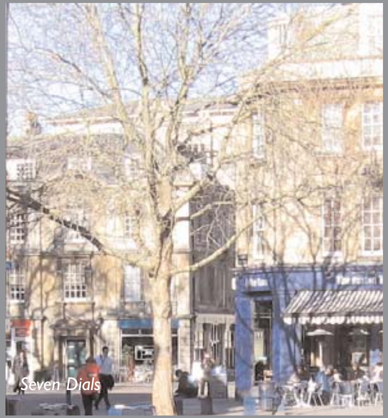
B1. Role

Bath City Centre has a vital role in the wider sub-region and should be enhanced to better meet this role. Bath is a unique asset for the West of England and should be shaped as such.

A key role for Bath City Centre should be primarily to serve the local community, whilst also operating as a first class visitor experience. Bath's catchment is significant but has suffered from residents shopping elsewhere over the past years.

Bath should exemplify how a high quality experience is created through integrated activities. It should illustrate how retail is fundamental to the economy, function and distinctiveness of the City.

The following pages provide a summary of the catchment customer base which Bath must serve. This information provides a strong basis for steering Bath's future role and development to best meet customer needs.


Seven Dials


Link from Seven Dials to James Street West

Bath's customer base

In order to steer the retail sector in Bath, it is essential that the nature and shopping habits of the customers themselves are fully identified and understood. This can be achieved through a system called Mosaic which categorises UK households in terms of their consumption patterns, relative affluence, lifestyle, life stage, economic outlook, retail requirements, aspirations and attributes.

Every postcode (usually representing circa 12-14 households) in the UK can be assigned to one of 11 Mosaic lifestyle groups, providing a more in-depth and accurate assessment of the people living in those homes. The adjacent table provides a comparison of the proportion of each of the Mosaic lifestyle groups in both the Bath and North East Somerset catchment area and the Great Britain average.

This information is relevant to all the centres in the District but has been addressed here specifically as developing Bath's offer must be closely allied to its catchment needs as only Bath serves the whole of the wider area .

Table 5.1 highlights the following key comparisons:

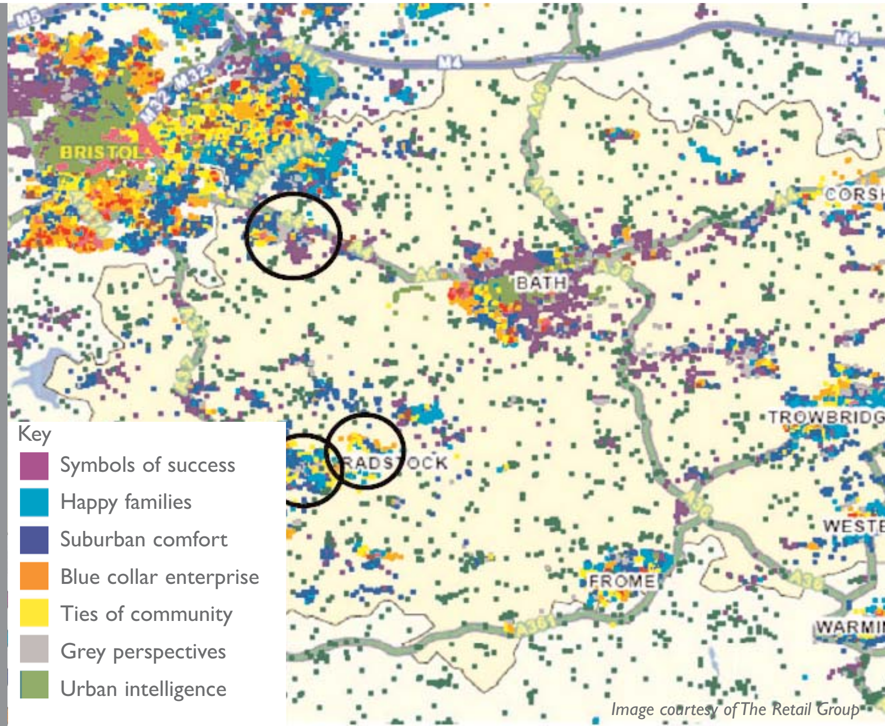
- The Bath and North East Somerset catchment area profile is broadly reflective of the national average and the same five groups dominate.
- The top five groups account for circa 76% of the catchment compared to the GB average of only 68%.
- Two of the top five groups are at levels above national average (Suburban Comfort and Happy Families).

Further detail on Bath and the wider District's customer profile can be obtained in Annex B which accompanies this Strategy document.

Table 5.1 Representation of lifestyle groups

Mosaic Group	BANES catchment	GB average
Suburban comfort	21%	16%
Happy families	18%	12%
Ties of community	14%	17%
Symbols of success	12%	11%
Blue collar enterprise	11%	12%
Grey perspectives	7%	7%
Urban intelligence	6%	7%
Rural isolation	5%	5%
Municipal dependency	2%	6%
Welfare borderline	2%	5%
Twilight subsistence	2%	3%

Figure 5.3: Lifestyle group distribution across catchment



Mosaic distribution

Figure 5.3 indicates the distribution of Mosaic lifestyle groups within Bath and North East Somerset.

The plan indicates the following key points:

Bath City Centre has a particularly high concentration of Urban Intelligence residents. There is also a high proportion of Symbols of Success living on the outskirts of the city.
To the south west of the city centre, there is a significant number of Blue Collar Enterprise and Ties of Community customers.

SUBURBAN COMFORT

Bath & North East Somerset 21%
Great Britain average 16%

Key attributes:

- Many older working ages with grown up children and possibly grandchildren.
- Local business entrepreneurs.
- Mainstream tastes.
- Practical and pragmatic in their choices.
- Shop regularly in Marks & Spencer.
- Personal service and quality are more important than price or latest trends.
- Value social responsibility.
- Spend well on personal services, such as laundry, dry cleaning and hairdressing.
- Good market for leisure and entertainment.
- Good market for home improvements.
- Fashion less important than hardy outer wear and equipment.
- 'Buy British'.
- Look for brands at the upper middle end of the market.

HAPPY FAMILIES

Bath & North East Somerset 18%
Great Britain average 12%

Key attributes:

- Young families on high incomes.
- Detached houses; two car families.
- Financially confident.
- Mainstream, unpretentious tastes.
- Take advantage of credit and loans.
- Like to have new consumer products and brands.
- Home improvements – bathrooms, kitchens, extensions, gardens.
- Busy, convenience is important.
- Focus on the family; both what they buy and leisure activity.
- Dedicated, experienced shoppers.
- Good market for eating out and package holidays.

Images courtesy of The Retail Group

TIES OF COMMUNITY

Bath & North East Somerset 14%
Great Britain average 17%

Key attributes:

- Close knit, established communities –'local' orientation.
- Self sufficient and family oriented – many with young children.
- Skilled craftsmen and supervisors and back-office jobs.
- Higher than average wages for manual workers, below average unemployment.
- Own their own homes, drive their own cars, responsible jobs.
- Good market for most mass market brands and some mid market brands.
- Value responsibility, reliability and consistency.
- Eat 'British 'food and drink 'British' beer.
- Willing to try new brands and products.
- Spend on home entertainment, gardening and leisure.


Images courtesy of The Retail Group

SYMBOLS OF SUCCESS

Bath & North East Somerset 12%
Great Britain average 11%

Key attributes:

- Full nest families with children in secondary school or older.
- Well paid executives working in large corporations.
- Large modern houses with company cars.
- High tech gadgets.
- Value brands that offer high levels of flexibility and personalisation.
- Keen to try new products and latest brands.
- Good market for home furnishings and home improvements.
- Spend well on electricals and leisure equipment for children.
- Many enjoy shopping in department stores or at independent retail outlets.
- Spend highly on antiques and collectables, travel and eating out.
- Concerned for the environment.

Catchment profile

The Mosaic profiles illustrate that the population has the following characteristics:

Slightly higher than average social profile.

Well educated and enjoying good employment.

Primary target consumers focus on five lifestyle groups, three of which share a mid market position.

Propensity to spend on the home (furniture, furnishings, DIY, gardening, china / glass) and sports and hobbies.

Mainstream, traditional tastes with a preference for mid market brands.

Enjoy shopping in independent retailers as well as national multiples.

Heavy users of personal services.

Average levels of disposable income.

Convenience and ease of use is important to many.

Key Issues

From the context and summary of customer profiles it is clear there are some key contextual issues for retail investment and footfall. These primarily are:

- Quality and vitality of the public realm.
- Convenience and quality of access.
- Image – what does the City offer and where is it going?

The Retail Sector Analysis indicates that development is required to meet the needs of the catchment. New comparison retail should be particularly focused on the home improvements sector, including furniture, household textiles, domestic appliances, and fittings and fixtures for the home. The headline retailing issues to be addressed are:

- Supporting retail diversity.
- Improving the existing retail area.
- Accommodating future growth.
- Competing with increased internet shopping and investment in other countries.

Aims

The key aims for the city should be to:

- Secure Bath's role as a prime retail destination in the sub-region.
- Provide an attractive (and competitive) alternative to Bristol City Centre and Cribbs Causeway, to avoid the need to travel.
- Ensure Bath's image and its offer reflect its full potentiall as a vibrant modern city e.g. young fashion
- Serve the local population and support an enhanced quality of life for the community.
- Provide an enjoyable and high quality visitor experience.
- Provide a supportive environment for independent retail businesses to underpin quality and diversity.
- Provide a high quality, unique shopping and leisure experience for all.
- Use retail to help achieve wider aims for an exemplary mixed use sustainable city.

Stall Street

B2. Overarching principles

Underpinning the Strategy for Bath City Centre are the following principles:

- Retail should be seen as a driver for City Centre growth and a key component of the Bath experience.
- The creation of retail circuits is central to the future success of the City Centre.
- The overall offer should strike a balance between independent / quirky / individual shops and a more mainstream retail offer.
- The profile and benefits of local production and consumption should be promoted through the creation of space that can bring buyers and sellers together. Bath should aspire to be a leader in providing locally sourced and low environmental impact goods in a retail environment where sustainability and local distinctiveness is paramount.

Supporting retail diversity

The retail composition of Bath City Centre is distinctly different from its regional competitors. The strength of the independent retail sector in Bath generates a character of unique value where shoppers feel that they can obtain goods which perhaps are not available elsewhere in a retail environment with a high level of service and care.

The opportunity exists in Bath to build upon this distinctiveness and to encourage retailers which generate a strong experience for visitors. Analysis of the retail sector, and of competing centres, has shown that Bath is unlikely to be able to create the conditions to compete on a floorspace and footfall level with Bristol. Bath, however, does have much more potential to provide a retail sector which has a greater diversity of functions and encourages people to dwell, both for a day trip and possibly for weekend visits.

Historic retail unit in Bath

There is, however, a need to establish a balanced retail offer to meet the needs of consumers – both residents and visitors. Both independent and multiple retailers are important to secure this objective.

Importantly, Bath has recently slipped out of the top 50 retail centres in the UK. The retail rankings prepared by Experian are based on indicators such as number of multiple operators and therefore do not tell the whole story. However, given that Bath was once one of the top centres and as recently as 2003 held the position of 30th there is a concern that as a centre it is losing out to competitors such as Bristol which in 2008 jumped to 14th from a 2007 position of 24th. Evidently, the opening of Southgate will have an important role in addressing this competition.

Independent retail

The independent offer is a defining element of Bath's character. A key objective of the Retail Strategy is to ensure that this sector continues to flourish.

The Council is a major landowner in the city centre. It would not be appropriate for the Council to in effect subsidise retail businesses through manipulation of its letting terms as this could give rise to unfair advantage for some retailers and distort competition. However, the Council will wish to consider the bigger picture to help ensure that the city's retail sector overall continues to thrive. It should therefore consider support for the independent sector through careful consideration of its influence on the retail mix across the city, via its lettings and estate management policy. Through its commercial estate management, and linking to the city centre management proposals, the Council should consider the potential for helping to facilitate synergies such as joint promotions, linkages between retailers, cafes and restaurants and establishing retail and turnover index information as a contribution to monitoring retailing in the city.

Key actions proposed are:

- Planning and Property Management – supporting independent retail in appropriate locations across the City Centre.
- Marketing and advice – promoting Bath's independent sector as a key tenet of its unique selling point, and supporting retailers with management and market advice where possible.
- Providing a proportion of small units in new development to accommodate independent retailers.

These actions are linked to proposals below in respect of landlord collaboration and a retail investment panel.

Multiple retail

The objective is to develop Bath as a major retail destination and in meeting the needs of local consumers a good representation of multiple retailers will be required to provide the widest possible range in quality and cost terms as well as products and services. Customer behaviour must inform the retail mix, ensuring that shoppers' limited time and appetite for split trips is accounted for (namely that customers prefer to be able to do one trip encompassing both independent and niche retail shopping as well as everyday shopping). Overall Bath must offer specialist and mainstream shopping.

The emergence of Southgate is one of the most significant step changes in the retail capacity of the city and will provide for a significant amount of new modern retail space in the south of the City Centre. There will be a need to make sure the distribution of multiple retail outlets is balanced across the centre to support wider retail circuits and activities.

Shop frontage in Bath

Retail skills
The Southgate development provides an opportunity to initiate work on developing retail skills as proposed in section 5.3 above. The West at Work project (www.westatwork.co.uk) should be used as a platform for developing a skills and jobs offer that can both help maximise the number of local people employed and enhance retail skills across the city.

Local retail and shopping experience
Bath should aim to become a centre of excellence in the provision of locally sourced (and organic as appropriate) produce. This will help increase Bath's strength as a distinctive location, enhancing its competitive edge in relation to Bristol.

B3. Improving the Existing Retail Area

The public realm represents a canvas for investment and pedestrian footfall. There is a need to address the disparity between outstanding architecture and poor quality public realm in the City Centre. Currently the poor quality public realm inhibits east-west investment and activity and reinforces the dominance of north-south footfall. The dominant north-south pedestrian flow creates a constrained environment and does not support east-west movement and retail circuits, meaning some peripheral areas are disconnected.

Public Realm and Movement Strategy
Despite its undoubted architectural identity and character, the public realm in Bath provides both a poor environment for pedestrians and a poor context for retail development. It does not complement the key architectural assets in the city, which should create highly attractive backdrops for intimate public spaces.

A programme of public realm investment is required to bring the streets and public spaces up to the level of quality appropriate for a World Heritage City. The emerging Public Realm and Movement Strategy must be delivered with some key priorities to support a high quality experience. Some of the key aspects are:

- Enhancing way finding – through consistent treatments and signage where appropriate.
- Creating an environment for retail circuits – pedestrian environments to allow for spreading footfall and investment, linking peripheral but special areas such as Walcot Street, and improving east-west routes to ease footfall pressure on the north-south axis.

The public realm and movement strategy advocates a 'light touch' with the sensitive restoration of the city to its former glory achieved by removing all clutter and using simple materials. The Strategy's proposals to remove traffic will create a more pedestrian friendly, walkable city. Figure 5.4 shows the existing retail circuits in the city centre as a basis for proposed extensions (see Figure 5.5). The public realm of these key routes will be

Figure 5.4: Existing retail circuits

central to the success of the retail experience.

The quality of the public realm is essential to creating an enjoyable overall experience of the city. The Public Realm and Movement Strategy will deliver a comprehensive framework for improvement. The Strategy will ensure that the arrival experience (by various modes of transport) and moving around the City Centre as a pedestrian is a much improved experience and will create key nodes of interest and spaces to linger. The manner in which people get to and arrive in the City Centre is important to their choice of Bath as a shopping destination. Ensuring that arrival is easy and stress-free will boost the overall experience significantly. There is a need for a strategy to steer car parking provision both in quantitative and qualitative terms. Equally improvements to reduce traffic congestion are required as part of wider transport strategies, including further pedestrianisation within the core retail circuit area.

Outdoor activity

Greater commercial and cultural activity on the streets and in public spaces in the City Centre would provide a new vibrancy and provide a more modern shopping experience. The creation of spaces for people to meet, linger and be entertained is central to both the Public Realm and Retail Strategies. The quality of outdoor entertainment needs to be managed.

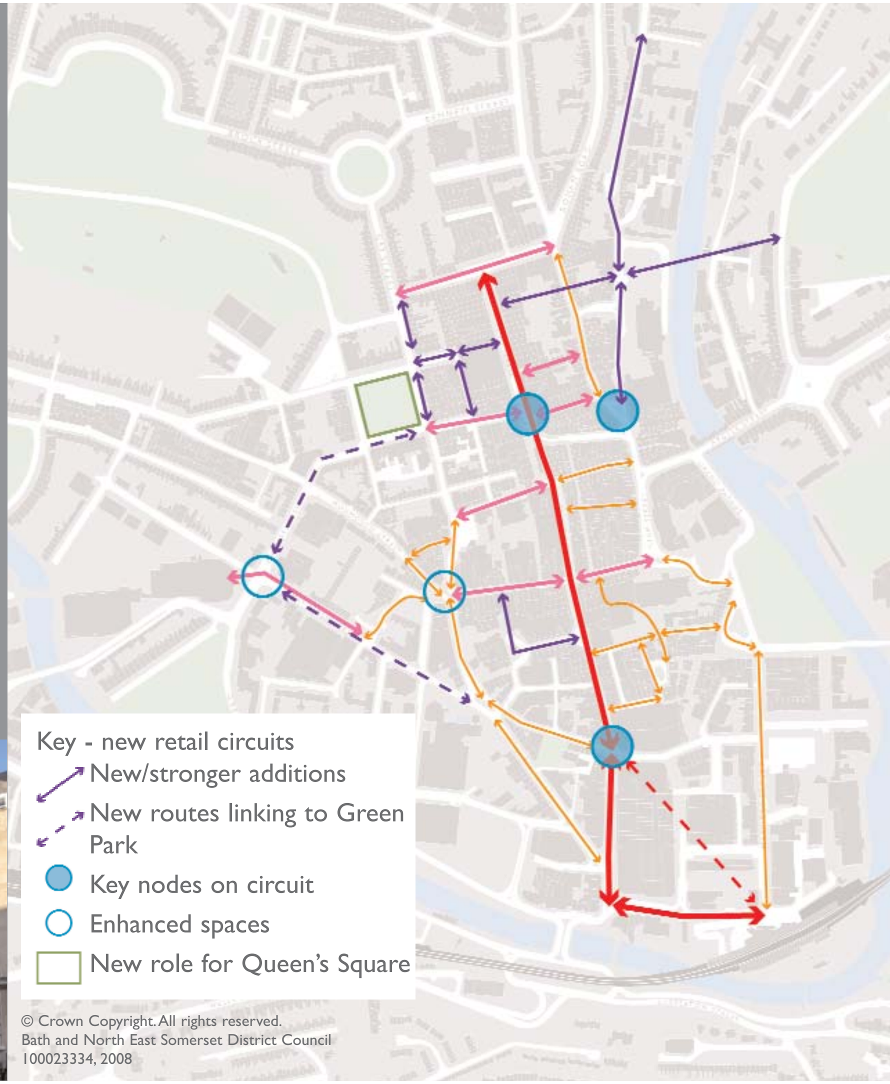
Outdoor café culture and (free) entertainment would help make the City Centre more child friendly. The Christmas Market is an example of how such actions can animate the city.

It is suggested that key opportunities for such interventions include:

- Kingston Parade (Abbey Square) – a key space with unrealised potential. This is one of the few public spaces of significant size in the city centre and whilst it is vital to provide a good Tourist Information Centre, the potential of the space is not currently fully realised. There is an opportunity to consider the relocation of the Tourist Information Centre and conversion of the buildings to restaurant(s) /café(s) with outdoor tables.
- Saw Close and Seven Dials – extending the levels of outdoor activity through improved public realm and an entertainment programme should be encouraged.
- Milsom Street – the potential to close this street to traffic and establish a completely pedestrian environment during the day and early evening would ease pedestrian congestion and dramatically enhance the


Abbey Square

Figure 5.5: Proposed retail circuits



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Bath and North East Somerset District Council
100023334, 2008

experience of this attractive street.
- Broad Street / Northgate Street - to build upon the enhanced connectivity established by the Milsom Place development, from Milsom Street through Broad Street to the Podium and ultimately, through new development to the river. Public realm enhancements to Broad Street and Saracen Street should be considered.
- Queen Square – the potential to create a new hard landscaped space for outdoor eating on the eastside of the Square, if the road can be closed to traffic, should be investigated as this would provide an attractive location for people to take a break from shopping. This intervention could strengthen a potential retail circuit between Milsom Street and also facilitate a link to Royal Victoria Park.
- Southgate – emerging public realm proposals should be influenced to allow for outdoor activity.
- Riverside areas (through new development) – optimising opportunities for outdoor activity at the river's edge would add significantly to the experience of Bath for all.

Supporting leisure activities

Leisure uses are important in supporting the centre's overall offer and attraction. Bath's evening economy is predominantly comprised of a mix of restaurants, pubs, bars, nightclubs and take-aways, relatively typical for any city in the UK. A relatively narrow offer of theatres and cinemas also supports evening activities. There is a mixture of independent venues, such as Moles nightclub, along with national franchises, such as Pizza Express and Strada restaurants. Pubs, bars and restaurants are relatively evenly dispersed throughout the City Centre, with the exception of the main retail axis between Westgate Street and Bath Spa rail station which has very limited activity levels during the evening.

Whilst Bath's evening economy is typical of a city of its size, there is a strong feeling that the city has a great deal more to offer and that evening activities could be diversified to appeal to a broader range of people. The city centre is often perceived as being unsafe and, while levels of crime are relatively low, it is often suggested that anti-social behaviour can be an intimidating factor deterring people from visiting the city during the evening.

Importantly, there are some key constraints and issues associated with expanding the evening economy. Bath City Centre is relatively heavily populated and therefore any conflict between residents and evening activity must be addressed. In addition, the city has traditionally been a reserved and sophisticated place. Any addition to activity will need to be sympathetic to this quality.

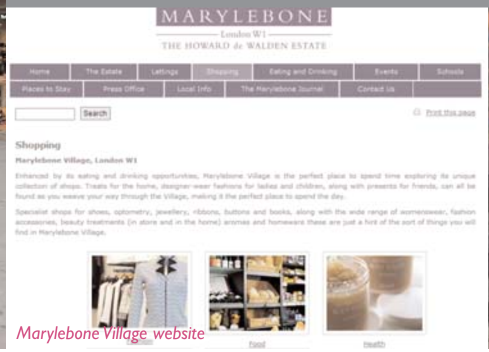
The introduction of a greater variety of evening economy uses would help to shift the character of the City Centre in the evenings, encouraging its use by a greater range of people. Potential additions might include a casino. A programme of activity should be established to support the evening opening of shops. This could be initially piloted during the summer and could link into the late opening of the Roman Baths.


Walcot Street

Street leisure

King Bladud's pigs in Bath

The introduction of leisure facilities into the public realm can provide a more subtle distinction between the retail and leisure environment by providing space for people, often families, to be entertained whilst enjoying a shopping visit. Low cost, on-street family entertainment could be provided as part of the programme to encourage a wider cross section of the community to use the City centre in both the daytime and the evenings. Simple low cost provision such as chess, table football and children's building blocks has been proven in European cities. In Bath the 2008 Bladud Pig Trail indicated the potential.



Marylebone Village website

An emerging trend in retailing is the incorporation of an experience within a store which provides information and encourages interaction with consumers. Examples of this include Tiso, who provide rock climbing facilities within their stores, and Nike, the sportswear manufacturer, whose Niketown outlets represent an interactive museum for sporting goods. Retailers of this type would help add to Bath's distinctiveness and link to the proposal that the city should develop its reputation as a place of retail innovation.

Markets and street trading

Markets can play an important role in Bath's retail offer by helping to spread footfall, accommodating some of the need for new space, providing space that is particularly suited to selling local produce and helping to incubate new independent businesses.


Street leisure

Expanding the market offer provides a diverse approach to absorbing the forecast floorspace demands. The objectives should be to expand market operations in ways and locations that help to spread footfall, add to the City's offer and provide opportunities for incubating new independent retail businesses. It is recommended that the Farmers' Market that operates at Green Park station is expanded, and opportunities for enhancing the offer at other market locations such as the Guildhall are investigated.

Temporary stalls and trading can add to the vibrancy of the street scene and help to spread footfall. The existing situation needs to be addressed to maximise the contribution of this activity. The quality of street trading stalls must be enhanced so they add appropriately to the offer and act as business incubators. The strict enforcement of existing policies and the removal of peddlers is also required.

As part of the wider strategy to support retail circuits the location of stall pitches should be reviewed. It is recommended that pitches are removed from the main north-south axis and relocated to the east-west routes and less populated streets to allow them to flourish and support street activity. This proposal will need to be explored in conjunction with further work on implementing the public Realm and Movement Strategy.

City Centre management

The scale of change envisaged for the City Centre means a significant task of co-ordination. Working with all retailers will be central to the ultimate success of the Strategy. Bath must provide an exemplary experience and therefore requires City Centre management. A new company, Future Bath Plus, has been established and a City Centre Manager is in place. The engagement of the private sector alongside strong support and action from the relevant Council departments will underpin the management initiative. This public/private partnership should direct the following:

- The management and care of streets and public spaces.
- Promotion, building upon the current work by Bath Tourism Plus and linked with the emerging work on a set of wayfinding graphics to create exemplary promotional material on what Bath offers. There should be a specific focus on the independent streets and the opportunities offered by some of the more 'hidden' locations. Bath should strongly promote the distinctive and 'authentic' shopping experience offered by the city.
- Exploring the potential for developing a Business Improvement District Scheme (BID) to support local improvements.

Develop a servicing strategy

The visibility of servicing and the disturbance it causes in the historic centre must be addressed to improve the shopper's environment.

The creation of a central distribution centre outside the centre, from which delivery to all central shops could occur (as proposed in a European CIVITAS funding bid), would dramatically improve the retail environment and shopping experience. Such an intervention would mean deliveries into the centre could be managed and limited to appropriate vehicles and times without disrupting delivery networks and patterns.

This initiative would also form a key part of the retail strategy's aim to provide shopping in the most sustainable way possible.

B4. Managing investment

The retail mix is vital. Bath's physical form is a key determinant and a prime reason for the city's high proportion of independent and niche retailers. However, Bath's distinctive offer needs to be actively nurtured and developed.

Whilst as part of the background work in the preparation of the strategy an indication of the range of retailer requirements for stores in Bath was sought, this can only provide a snapshot and will not have revealed all potential interest.

Ultimately, decisions on occupation of retail units are made by landlords, responding to opportunities presented by the market. There is in Bath a major opportunity for managing and targeting retail investment to optimise the city centre mix. The city has the advantage of a relatively small number of major landowners. This presents the opportunity for a coordinated approach. Whilst respecting commercial confidentiality and competition, there is a shared interest in the overall long-term success of the city as a retail centre.

To seize this opportunity, mechanisms should be established for landlord collaboration. These arrangements should link to city centre management, the proposed Retail Investment Panel (see section 5.3) and the aim of creating a city reputation for retail innovation and leading edge retail provision.

The analysis work behind this Strategy involved retailer demand assessment and identified a number of national retailers wanting space in Bath and this could provide an initial basis for targeting investors. The establishment of some diagnostic tools to help inform investor targeting should be encouraged. Such tools would involve the collation of baseline data such as mapped retail frontages and occupiers, footfall information etc, and this could be linked to the overarching district wide database. Identifying gaps in activity along retail circuits would allow such units to be targeted towards the most appropriate operators.

It is proposed that landlord collaboration arrangements should be established to provide strategic direction towards letting and investor targeting for key city centre 'blocks' for example an enlargened Milsom Quarter covering the area from Queen Square to the Podium.

The promotion of Bath as a destination to local, regional, national and international tourists will help to support the retail and wider economy. Clearly defining the unique retail offer and experience will be important. The shopping section of the Visit Bath website could be further developed to create an exemplary internet articulation of the Bath shopping experience. This could include more information on the content and diversity of Bath's shopping offer, particularly its independent shops, drawing on examples from elsewhere such as Marylebone High Street www.marylebonevillage.com.

B5. Accommodating growth

Bath is part of the West of England Growth Area, within which the main focus for future development are the Strategically Significant Towns and Cities, of which Bath is one. The city is a constrained World Heritage Site where available land will have to meet the needs of employment, housing and retail growth together with associated infrastructure.

Employment and retail are both city centre uses which, in accordance with the sequential approach, should be developed within a City Centre as far as possible. To meet these requirements, future growth should be accommodated within a mixed use expanded City Centre.

Ultimately, the allocation of land for new retail floorspace must be determined through the Local Development Framework (LDF) to ensure an integrated approach to City Centre land uses.
This section provides a strategy for accommodating retail growth which can inform the LDF Core Strategy and land allocations. Growth in retail provision should support the aim of improving the existing retail area. It should:

- Meet customer needs.
- Create destinations that develop and enhance retail circuits and provide footfall for independent shops.
- Contribute to Bath's distinctive offer.
- Help drive a successful mixed use expansion of the City Centre.
- Be delivered sustainably.


City of Bath College from Westgate Buildings - fragmented frontage to be addressed

Demand and capacity
The demand for new retail floorspace has been summarised in the previous chapter. There is an existing need for convenience floorspace which grows slowly over the Strategy period. For comparison floorspace, demand is forecast to outstrip supply in 2016 and rises significantly throughout the remainder of the period.

The capacity to accommodate this forecast growth is constrained in the City Centre due to the fine historic grain and limited opportunities for redevelopment. Those potential opportunities for redevelopment that do exist are subject to a number of variables, particularly:

- The extent of redevelopment potential in the north west quadrant of the city centre - Broad Street / Podium area.
- The viability of relocating uses to unlock key linkages in the wider circuits, (for example Homebase to 'unlock Bath Western Riverside East').
- The future of the City of Bath College (whether this should remain as it is, relocate or remodel its existing campus and release some buildings for other uses given the current site's strategic location on valuable City Centre land).

The strategy is not concerned solely with accommodating forecasts but is about enhancing and developing a unique place. There is a need for the City Centre to grow in order to sensitively respond to growth requirements within the draft Regional Spatial Strategy and to address issues and opportunities identified in the Future for Bath work. A successful retail sector requires a successful mixed use City Centre, and therefore some of the key sites are likely to accommodate office led mixed use development in the short to medium term to meet a key need emerging through the Business Growth and Employment Land Study.

Retail is a key driver for growing the City Centre, given its dynamic nature and contribution to the vitality and viability of places.

A key question is in which direction should the centre grow in terms of retail? Fundamental principles underlying the solution must be:

- The sequential approach required by PPS6.
- Making the best use of the existing assets.
- The available opportunities and the potential for restructuring areas characterised by modern development that currently sever pedestrian links and inhibit retail activity and growth.
- The need for retail circuits and the importance of visual connectivity and stepping stones.
- The need to balance the north and south anchors.
- The need to spread footfall, and in particular, strengthening east-west flows.


East-west linkages to be strengthened to support retail circuits and enlargened retail area e.g. Quiet Street to Queen Square

The first priority must be to strengthen the northern part of the existing retail core, in order to balance the Southgate investment. Key factors for then extending the retail area are:

- The significance of the south west quadrant of the central area, which is identified in the Future for Bath work as a 'fracture zone'. This area inhibits the functioning and expansion of the city. Conversely, it presents an opportunity to restructure this area and support links to Bath Western Riverside.
- The potential for knitting together currently fragmented frontages along St James Parade/James Street West, Avon Street and Kingsmead Square to create circuits.
- The strategic location of the City of Bath College (a node visible from the junction of Southgate and Stall Street and from Kingsmead Square).
- The location of public transport interchanges and networks to ensure retail circuits relate well to these.
- The existing retail uses, character and potential of the Green Park Station area.
- The proposed Rapid Transit System between Newbridge Park and Ride and Green Park via Bath Western Riverside.

A bold approach is required if Bath is to make the most of its distinctiveness and avoid reinforcing existing weaknesses. This will require a strongly proactive approach by the Council with its key partners such as the business community and Regional Development Agency. However, caution must be exercised in terms of reviewing growth forecasts and ensuring that Bath's existing offer is safeguarded.

The strategy is, therefore, one of first accommodating growth in the northern part of the City Centre on opportunity sites between Milsom Street and the river. This should then be followed by bolder restructuring of the south western quadrant of the City Centre in the long term, through growth westward around James Street West and Avon Street, with the ultimate objective to incorporate the Green Park Station area. This will enable this more fragmented part of the city to be connected through more continuous retail frontage and river connections. A long term delivery plan should be developed as part of the Local Development Framework to steer this longer term change.

Options

The options outlined below are subject to the variables stated above and will need to be fully tested through the LDF process.

Figure 5.6 illustrates the opportunity sites potentially available for retail development in and around Bath City Centre. In reality, only a small number of the sites identified could be allocated to retail as other City Centre uses will also require space on these opportunity sites. The appendix illustrates the extent of visual connectivity or lack of it in relation to the retail potential of these sites.

Convenience

For the City of Bath as a whole the convenience floorspace need is forecast to be 3,250 sq m in 2011 rising to 6,100 sq m in 2026. This need should be planned for through the LDF in accordance with PPS6 with the following sequence in mind:

1. Define the city centre (it is suggested that a boundary should be established bounded by George Street and Queen Square in the north, the river in the east and south and Green Park Road and Charles St in the west - see Figure 5.7).
2. Apply the sequential approach.
3. Assess impact.
4. Ensure accessibility.
5. Consider other relevant matters including the constrained nature of Bath as a World Heritage site in terms of land availability, the fine grain of its urban form, highway network and public transport.

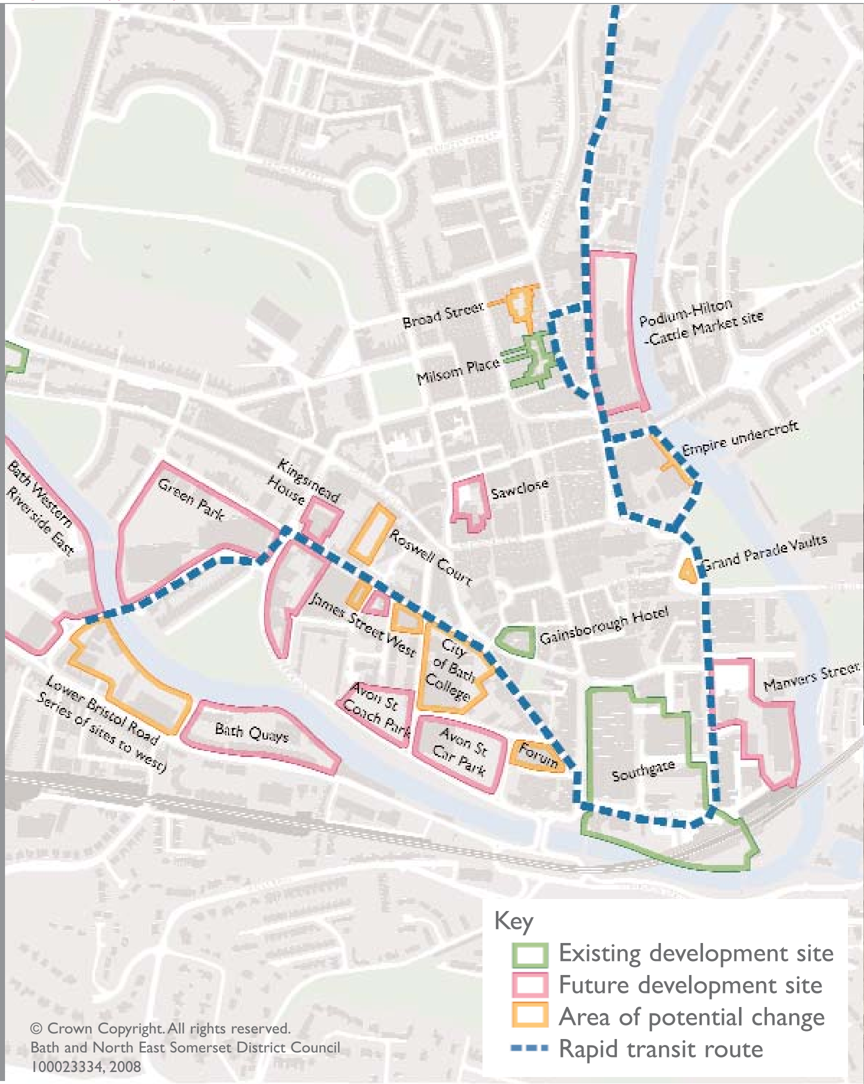
The proposed strategy is therefore to prioritise sites in the City Centre first and foremost, after which the next sequentially preferable site should be considered.

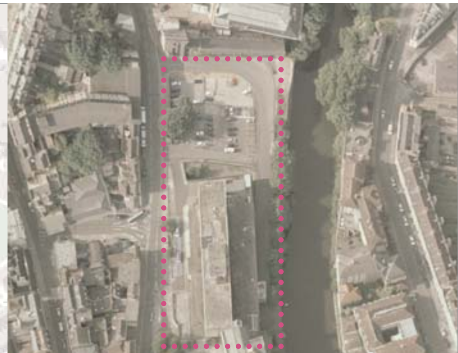
The Podium/Hilton/Cattlemarket site is the next priority and could potentially accommodate a net increase of 1,000 sq m. The Council will need to establish a delivery plan for this site related to production of the LDF. Elsewhere in the centre, 1-1,500 sq m could be accommodated on sites along James Street West including as a part of a remodelling of the City of Bath College campus.

The next sequentially preferable site, is the edge of centre location at Green Park Station currently occupied by a superstore and market, and Bath Western Riverside East currently occupied by a bulky goods format store. Options to provide a net addition to floorspace of around 2,000 sq m should be investigated here. One option could be to relocate the bulky goods format operation and to use this site for a larger convenience goods superstore. A second option could be to focus upon the Green Park Station site and the potential for incorporating the iconic station building as part of an innovative and distinctive larger superstore with some of the parking at basement level. The Council should therefore seek to establish a delivery plan for this site. A third option could be to redevelop the Homebase site and adjoining land to provide both a bulky goods store and convenience store as part of a dense mixed use development with other uses on upper levels.

In addition to the provision of significant convenience floorspace in the form of food stores on redeveloped sites, there are opportunities to meet some of the demand for floorspace through the development of additional food market stalls. Opportunities could be explored to extend stall floorspace in and around the Guildhall and along east-west routes through the centre. More

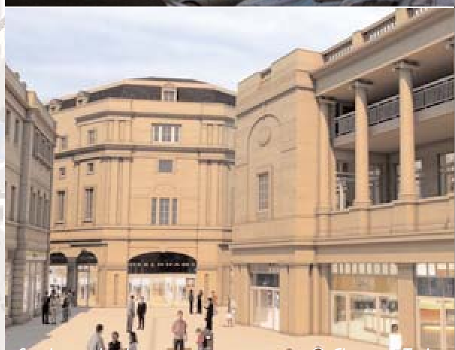
Figure 5.6: Opportunity sites





Cattle Market and Hilton site © BANES

Green Park station



Southgate development © Chapman Taylor significant opportunities should also be explored at Green Park Station.

If the city centre/edge of centre options cannot fully be delivered, consideration will need to be given to out of centre locations.

It is essential that any provision is in a location which is highly accessible by public transport and car from as wide an area as possible, particularly from areas currently deficient in access to large food stores.

Potential options could include Lower Bristol Road, Hayesfield former school playing field, MoD Foxhill and future urban extension sites. As bus routes primarily link the residential areas to the city centre, all sites outside the centre have limited accessibility by public transport. As a consequence any superstore in an out of centre location would increase cross-city traffic. This suggests that any out of town provision should be in medium size stores close to residential communities which are currently at some distance from existing provision. Any locations for out of town provision will need to be subject to a test of impact on existing local centres.

Consideration should be given to locating any such provision close to nodes on any enhanced or new public transport routes, such as the proposed rapid transit system.

Comparison

Forecast comparison floorspace demand for the City of Bath as a whole comprises of both city centre format comparison retail and large format retail which lend itself better to edge or out of centre locations. The forecast demand for city centre format floorspace is forecast to be 5,950 sq m net floorspace in 2016 and 36,550 sq m net floorspace in 2026. For large format floorspace demand is forecast to be 2,450 sq m net floorspace in 2016 and 6,950 sq m net floorspace in 2026.

The Strategy for developing the comparison offer in Bath is to first allow Southgate to become established, then to strengthen the retail core through investment in the north and then subsequently expand westward to Green Park. Forecast growth requirements should be reviewed once Southgate is established.

Additional destination stores should be sought in the north and west of the city to complement Southgate. Key anchor points should be established for retail circuits in the north, south and west of the central area.

Proposals for Broad Street and the Podium/Hilton/Cattle Market sites should be progressed as a priority as these are key potential locations for a destination store. The feasibility of leisure use such as a boutique hotel on the King Edward's School site should also be explored as well as some retail at the rear to link the proposed development of Broad Street car park with Milsom Place.

The main potential options available for accommodating comparison growth, in sequential order of preference, are as follows:

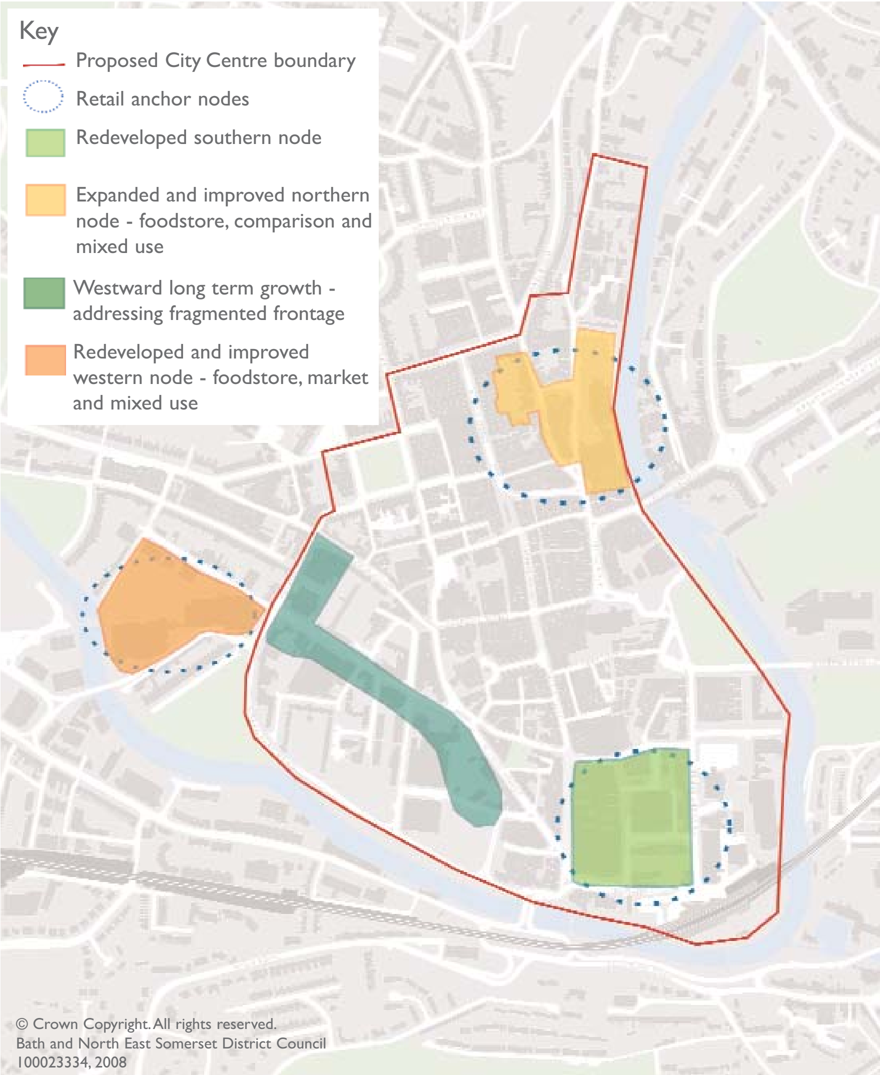
To reinforce the existing central retail area:

1. Southgate - when the scheme opens in 2010 it will provide 37,000 sq m net of comparison retail floorspace (a net addition of 17,000 sq m). (Please note, this capacity has been already accounted for in the forecast growth figures quoted.)
2. Podium and Broad Street – there is capacity to potentially provide an additional c.5,000 sq m net of floorspace through redevelopment of the Podium site as well as an additional 2,000 sq m net through separate, but complementary, re-development on Broad Street car park. This would strengthen the northern anchor and retail circuits. Consideration should also be given to the adjoining corn market and its potential for accommodating retail or complementary uses that could help develop Bath's distinctive offer.

To help create an expanded, mixed use city centre:

3. City of Bath College site – could accommodate 2,000 sq m of retail and services ground floorspace along the main street frontage through redevelopment (this capacity would assume no convenience provision).
4. Green Park – significant potential exists to establish Green Park as a complementary quarter (at the edge of an extended City Centre) with a distinct retail, cultural and employment offer, for example lifestyle and home retail with design and production services as well as outdoor entertainment and A3 uses. This location could accommodate in the region of 10,000 sq m of additional floorspace, but would be dependent on re-structuring the existing convenience offer currently on the site.
5. 1-4 James Street West, 12-16 James Street West and Kingsmead House - could accommodate ground floor retail development.
6. North east corner of the

Figure 5.7: Spatial concept



Avon Street car park, along part of the Ambury and Corn Street frontages, if a suitable route can be established through the College site to create a circuit linking Southgate to James Street West / St James Parade. Without such a route any ground floor retail provision on the Avon Street car park site is likely to act as a cul-de-sac in terms of its relationship to the rest of the city's retail provision.

The provision for comparison space should address current gaps in the offer. Analysis indicates that Bath has an opportunity to provide greater variety and better quality retail of the following types:

- Anchor stores;
- Fashion;
- Home goods;
- Hobbies and sports;
- Catering outlets; and
- City centre leisure.

For comparison goods floorspace, only growth needs that require a format that is not capable of being accommodated in the city centre, or in circumstances where city centre sites are not available, should edge or out of centre provision be planned. Looking to longer term, after completion of Southgate and the Podium / Broad Street as the next priority, the sites identified above at 12-16 James Street West and Kingsmead House would offer potential for larger format retailing at ground floor level.

In addition, the current Homebase site could be much more densely developed with some additional larger format retailing at ground floor level as part of a mixed use scheme on the river frontage and including basement parking.

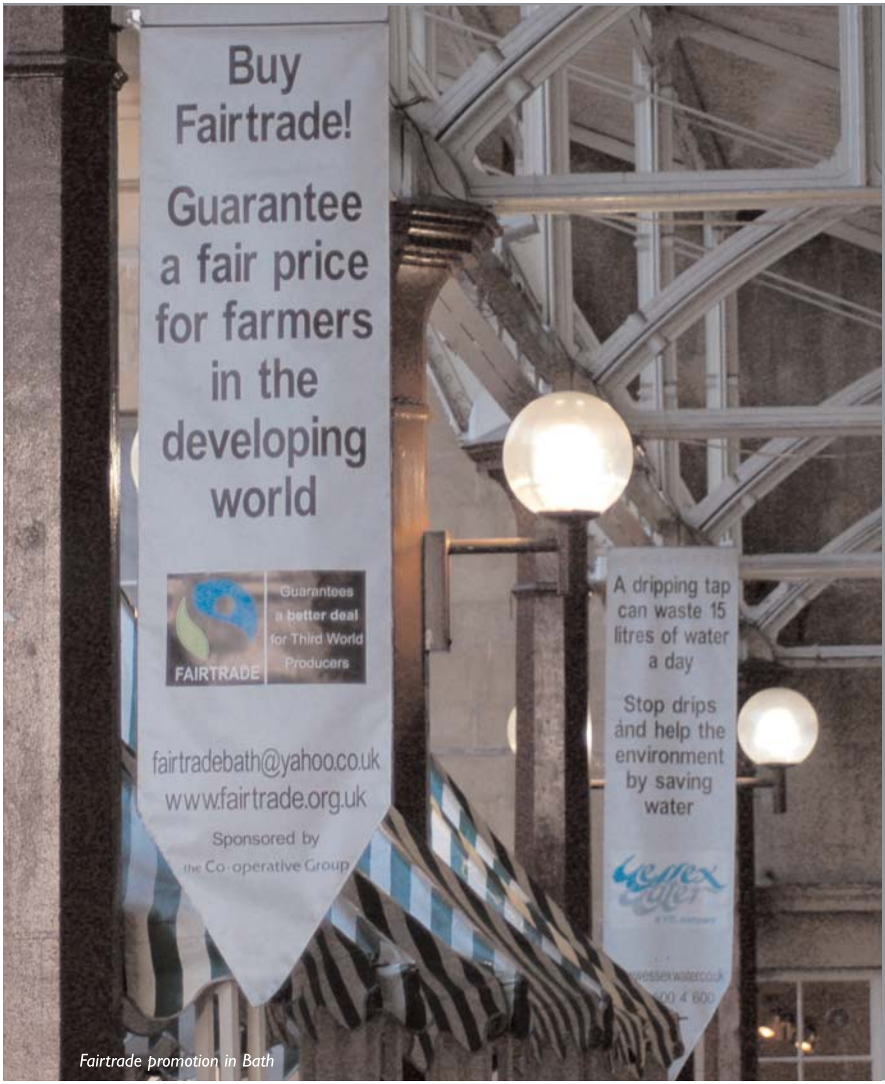
Spatial strategy

The need for retail provision to be part of a mixed use city centre and the requirement for growth of the central area have been identified as key principles for this strategy. The extent of the central area should be identified through the LDF process to accord with PPS6. Figure 5.7 proposes a boundary for consideration as part of the LDF process.

As the City Centre needs to accommodate new development of many types, not just retail, there is not the capacity to accommodate all the retail floorspace identified within the existing retail area. A sequential approach is required to ascertain the most sustainable path of retail development.

Rather than accommodate this additional space in the form of out of town stores which operate as separate destinations to the City Centre, it would be preferable to provide for City Centre demand as close as possible to the City Centre. It is therefore proposed that a city centre retail area be defined within which retail and other city centre uses can grow. This would encompass the City of Bath College, James Street West, Green Park Road, and Walcot Street.

A clear assessment of such a change is required. In particular, any decision to extend the



Fairtrade promotion in Bath

boundary should ensure that activity and viability elsewhere in the centre is not adversely affected. This should be reviewed and refined through the LDF process, taking account of all city centre needs.

As part of the long term restructuring of the south western quadrant, consideration should be given to the potential for ground floor retail on Monmouth Street and redevelopment of Rosewell Court. Such a bold approach raises many challenges, but should be explored nonetheless to ascertain the potential opportunities for re-provision and viable development.

The opportunities contained within this section relate to a variety of themes, locations, developments and activities which combine to generate a retail strategy for the City Centre. An overarching spatial strategy brings all of these opportunities together to achieve support for the Future for Bath proposition. This Strategy will ensure that the opportunities are coordinated in an appropriate manner, not addressed in isolation, but instead form part of a joined-up approach for the City Centre as a whole.

Figure 5.8 illustrates the spatial strategy. The key themes are:

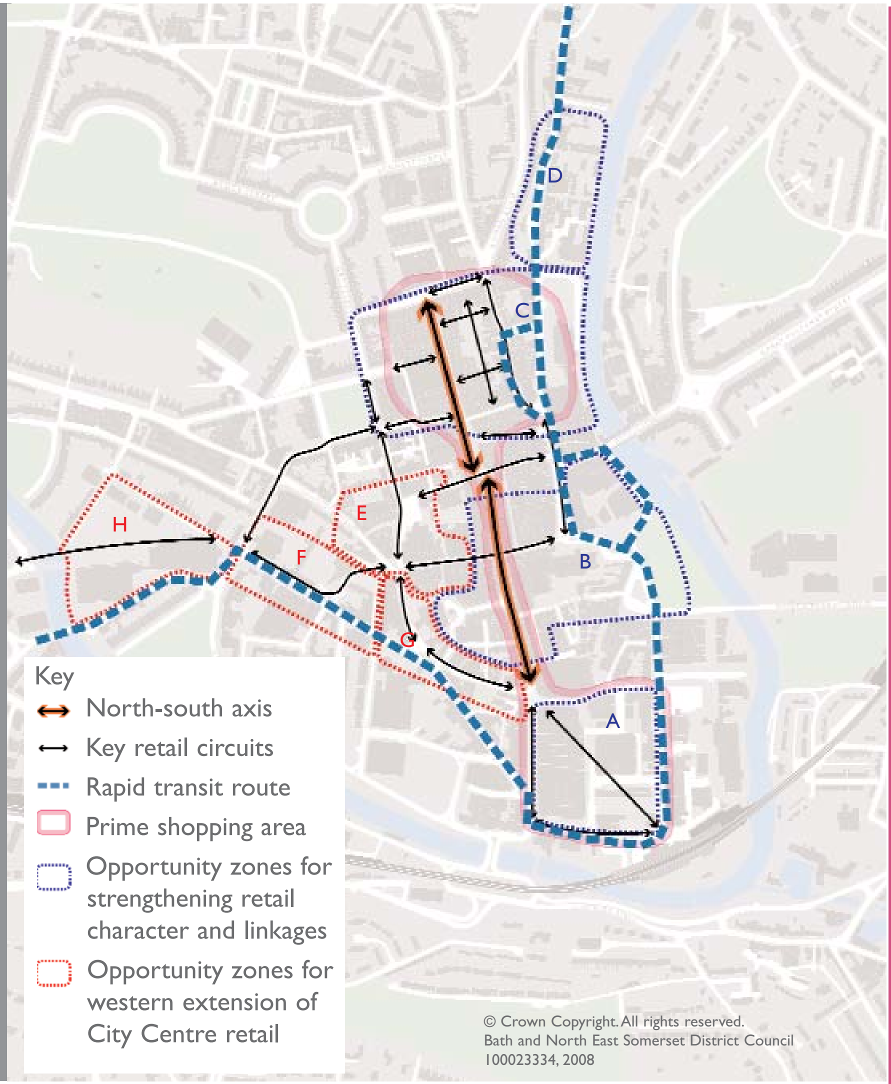
- Create a legible city.
- A public realm for a World Heritage Site.
- Local food retailers.
- Unique to Bath.
- Family friendly Bath.
- Interaction with the river.
- Extend the City Centre.

The Strategy must build upon the physical assets and strengths of the City Centre. The existing north-south axis is a defining feature of the current retailing pattern. The Strategy will support the circuits along and around this to establish a joined-up retail experience across the centre. The Broad Street and Podium/Hilton/Cattlemarket sites are key to this. In addition, Green Park represents a key opportunity for retail development in the long term. These two areas represent the prime areas for investment over the Strategy period.

The Strategy has identified some specific zones of retail opportunity. The key locations are:

A Southgate Centre.
B Central Quarter (including Abbey and Central shopping areas).
C Milsom Quarter (encompassing land between Queen Square and the Podium).
D Walcot Street.
E Seven Dials / Saw Close / Westgate Street.
F James Street West (western section)
G James Street West (eastern section)
G Green Park station / Western Riverside / Waterfront Quarter.

Figure 5.8: Spatial strategy



1. CREATE A LEGIBLE CITY
   - Improve way finding
   - Public realm improvements
2. A PUBLIC REALM FOR A WORLD HERITAGE SITE
   - Priority areas for improvement
   - Bespoke public realm solutions
3. LOCAL FOOD RETAILERS
   - Enhance and expand Farmers' market and specialist local food retail
4. UNIQUE TO BATH
   - Foster local independent retailers
   - Ensure a clearly articulated and rounded offer
   - Encourage new ideas and innovation
5. FAMILY FRIENDLY BATH
   - Facilitate easier movement
   - Provide for play and leisure
6. INTERACTION WITH THE RIVER
   - Greater pedestrian access-points
7. EXTEND THE CITY CENTRE
   - Strengthen northern node
   - Extend centre westwards

Outer Bath - neighbourhood centres

The City of Bath contains a number of neighbourhood centres (encompassing both district and local centres), such as Oldfield Park, which complement the city centre's retail offer by providing a range of convenience goods and services for the local neighbourhood populations.

Typically neighbourhood centres focus upon convenience retail provision, such as butchers and grocers, supported by services including banks, chemists, post offices and estate agents. Those who shop in neighbourhood centres would therefore tend to make relatively short visits for essential items, rather than linger for any significant period of time.

01. Role

Neighbourhood retail centres should continue to perform a very important role in supporting Bath City Centre through the provision of essential day-to-day goods and services for the local population. The strength of these centres is their location in close proximity to where the majority of the city's residents live and so shoppers are able to quickly obtain the goods that they require. They are also well placed to offer a sustainable and local choice for goods and play an important role in terms of social inclusion and cohesion.

The neighbourhood centres vary in size and role from the largest - Oldfield Park which is a district centre with a significant amount of comparison as well convenience and service offer - to some of the smallest such as Bathwick Hill which is just a set of small convenience shops.

Key elements of the strategy

- Support as key elements in a pattern of retail provision for the City.
- Improve the environment and access in outer centres for shops and shoppers.
- Support the development of traders' associations to help develop and promote the centres.
- Link to district-wide action on access to information and advice.

Moorland Road


Oldfield Park


Oldfield Park

Example of convenience retail in neighbourhood centres

Outer Bath centres

The current Local Plan designates centres in Outer Bath according to District, Local and Village centres. The Strategy proposes to retain this hierarchy and support the roles of centres within this structure.

District Centres

Within the Outer Bath area there is one centre which has a more significant offer than the others. This is Moorland Road (Oldfield Park). It is therefore identified as a district centre.

Local Centres

City centre:
The following local centre is located close to the existing primary shopping area and would fall within the proposed City Centre area in Figure 5.7. It will have a continued role as a local centre for residents living in the City centre, but will also provide opportunities for meeting convenience and comparison demand in the City centre:

- Margaret's Buildings.

Edge of City centre:
The following local centres are located on the edge of the City Centre retail area and will continue to perform an enhanced local centre role encompassing local needs as well as specialist and independent retail:

- Walcot Street.
- Lansdown Road.
- St. James' Street.
- River Street Place.

The following local centres will have an important role in meeting local day to day demands for Bath residents. The role of these centres as foci for their local neighbourhoods will be supported through planning policy.

Northern centres:

- Nelson Place East and Cleveland Terrace/Place.
- London Road.
- Fairfield Park.
- Larkhall.

Western centres:

- Chelsea Road (Lower Weston).
- Weston High Street.
- Twerton.
- Southdown.
- 65-86 Lower Bristol Road.

Southern centres:

- Wellsway (Bear Flat).
- Widcombe.
- Combe Down.
- Bradford Road (Combe Down).
- Frome Road/Bloomfield Road (Odd Down).
- Upper Bloomfield Road (Odd Down).

Eastern centres:

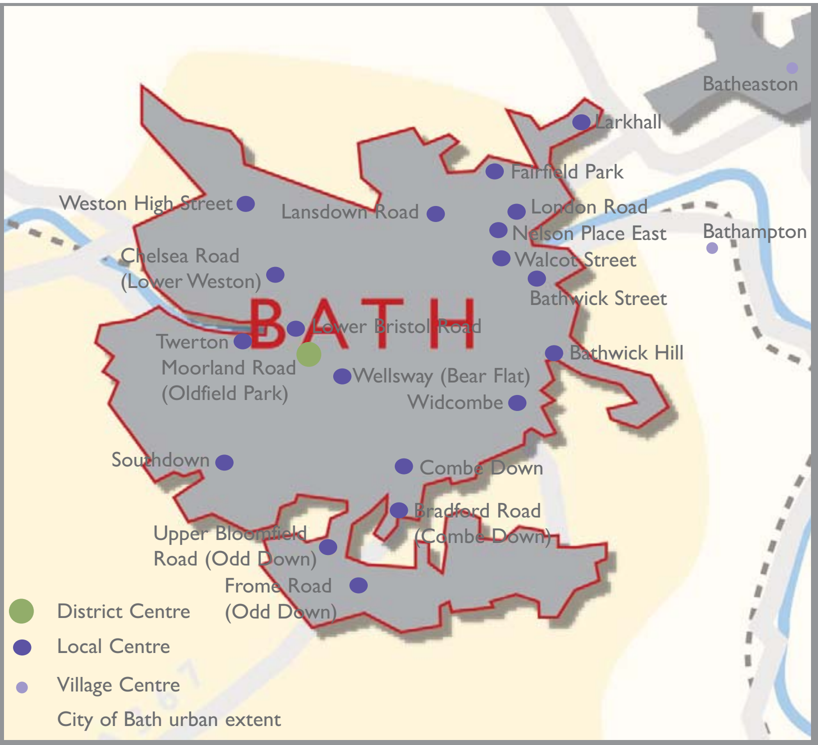
- Bathwick Hill.
- Bathwick Street.

Village Centres

The following village centres will continue to provide an essential service to the village populations just outside the Bath conurbation:

- Bathampton.
- Batheaston.

Figure 5.9: Outer Bath Centres



O2. Meeting customer needs

The network of centres in outer Bath is crucial to meeting the needs of the community and should continue to be supported and protected by planning policy. Retail development proposals that would be likely to have a significant negative impact on the viability and vitality of these centres should be resisted. Actions under the headings that follow will be crucial in helping these centres meet the needs of customers.

O3. Creating conditions for success

Given the importance of convenience and ease of access, the availability of short-term and on-street parking in close proximity to shops needs to be maintained within neighbourhood centres. Pedestrian access is also crucially important and therefore the footpaths and cycle ways into each of these centres from their hinterland neighbourhood should be as safe and attractive as possible.

A 'healthcheck' audit of each of the district, local and village centres should be undertaken so as to identify areas which could be improved. These audits should form the basis of action plans which ensure the basic requirements of such centres are met. Such basics include good quality and direct pedestrian access with minimum barriers to movement.

The district wide proposal on the collection of developer contributions could be used to support enhancements identified in the action plans.

O4. Information and advice

Retailers in the Outer Bath centres should be encouraged to identify needs and opportunities through their own traders' associations. This should be supported by easy access to good information and advice as set out under the district-wide proposals. Such a service might include information for example on customer profiles, advice on establishing a traders' association, on product mix and promotion etc.

The neighbourhood centres' role as incubators for businesses and retail points for local produce will need to be supported by central co-ordination. The district wide work to identify local suppliers and identify the local network will help to indicate appropriate retailers or opportunities in these centres.

O5. Development

The strategy proposes that future retail development in Bath should primarily be located in or on the edge of the city centre. However flexibility is needed in order to accommodate retail growth requirements that may prove to be undeliverable in or on the edge of the centre.

With regard to convenience retail floorspace, the strategy proposes that growth is accommodated in the city centre, subject to testing of deliverability through the production of the Local Development Framework. If the need cannot be fully met within or on the edge of the centre, some out of centre provision will be needed. Because of the characteristics of the City of Bath, any large superstore in an out of centre location would be likely to generate significant cross-city journeys and potentially impact on existing Outer Bath centres. The scale and location of any new out of centre convenience retail floorspace, both in relation to the pattern of residential communities and existing Outer Bath centres, will be key considerations. Unless detailed impact assessments demonstrate that a superstore development would not have unacceptable impacts on existing centres and trip generation, the strategy towards any out of centre provision should be one of accommodating medium size stores (1-2,000 sq m) in locations close to residential communities. This should include consideration of re-use of any appropriate units or sites that become available within existing district or local centres. Other potential sites are the former Hayesfield playing field at Odd Down, MoD Foxhill, land on the Lower Bristol Road and future urban extension sites.

Consideration should also be given to locating any such provision close to nodes on any enhanced or new public transport routes, such as the proposed rapid transit system.

6. Conclusions

Retailing in Bath and North East Somerset is in a broadly healthy condition. There are however, significant challenges and potential threats, as well as real opportunities for developing and enhancing retail provision in the district.

This strategy recognises that there are a range of forces and decision makers that determine the nature of retail provision. While the Council is only one amongst a number of players, it has a key role, with its partners, to realise the opportunities, address the challenges and mitigate threats. This strategy sets out a basis for action to:

- Create a supportive environment for independent retailers whilst enabling competition and change.
- Develop excellence and innovation by harnessing specialist expertise and fostering creative thinking.
- Create an environment that is conducive to retail investment and vibrant retail activity.
- Achieve good management and promotion of the main retail centres within Bath and North East Somerset.
- Plan positively for growth to help shape distinctive and sustainable places.
- Ensure good intelligence on the retail sector and its performance to enable evidence based action and review.

This Retail Strategy provides a framework within which the retail offer of the District's key centres can be enhanced to best meet need and demand.

Retail is a vital part of each centres' sustainability in the long term and should be considered as an integral part of their vitality and viability.

Key messages

The Strategy raises some important themes which should steer change in the future. Some important messages include:

- Retail planning is essentially about enabling people to obtain the goods and services they want. It enables people to obtain basic goods, including food. For comparison goods, retailing is often part of a wider leisure activity involving a day out.
- Retailers succeed if they provide what the customer wants, at the right price and location, and in sufficient volume to be viable.
- Retailers are affected by many factors, including the current economic climate, economic trends and trends within the sector.
- Customer behaviour is also affected by many factors, including demographic and economic trends and changes within the retail sector.
- Overall the quantity, quality and location of retail provision has a major influence on places and people's experience of places.

All these messages are central to how the Strategy is implemented. Crucially, they raise the importance of regularly reviewing the Strategy in light of local and macro economic circumstances. The Strategy provides a best estimate forecast of need and demand, but this should be informed by continuous monitoring and review to ensure each of the centres can react appropriately to market changes with a clear eye for the long term sustainability of the District.

The forecast floorspace figures should therefore be considered a guide for future development but must be regularly reviewed to keep them current and realistic.

Action Plan

An action plan has been prepared to steer delivery of the Retail Strategy. This is set out over the following two pages and details priority actions for each centre.

Strategy Heading	Priority Action
District wide	
Clear arrangements for managing the city and towns	City Centre management initiative underway via future Bath Plus. Review management needs and arrangements for the towns.
Information and Advice	Through business support partners, establish a retail information service and consider the potential for bespoke retail business advice to independents.
Retail Investment Panel	Establish a retail investment panel and related governance arrangements for an initial 12 month trial period. The focus should be on using leading edge knowledge and thinking to optimise the retail mix and to establish a reputation for excellence, new ideas and innovation.
Developer contributions	Develop rationale for developer contributions to support retail centre improvements and the independent and community retail sectors. Link this to policy formulation through the Local Development Framework.
Monitor change	Establish key performance indicators and a framework for ensuring regular provision of information and trend analysis. Link to the retail information service above.
Reduce business costs	Promote business rate relief to eligible non-claimants
Engage with major convenience retail operators	Host one to one discussions with major convenience retail operators to explore potential measures to support the Independent Sector. Consider a seminar to exchange ideas and good practice.
Support local product supply chains	Establish a directory of local food producers
Promote investment opportunities	Consider a local website linked to www.investwest.org to further promote retail investment opportunities in Bath and North East Somerset.
Develop a database of retailers and trade organisations	Establish retail database and use as a tool for dissemination of information and dialogue linked to city and town centre management.
Rural	
Information and advice	As part of the proposed retail information service above provide advice and signposting to sources of information on community enterprise and other models for operating rural retail businesses. Consider the potential for providing access to Council and other services via rural shops. Use the Local Strategic Partnership as a mechanism in exploring this potential. Plan a programme of business support visits to rural retailers to identify issues, map current retail provision and assess the health of rural retailers.
Market Towns - Keynsham	
Creating the conditions for success	Develop a public realm and movement strategy for the town centre.
Management and Information	Linked to clarification of town centre management arrangements, develop a programme of town centre activities to promote the town and attract customers.
Development	Implement a food store development at Charlton Road ensuring a good quality pedestrian link to the High Street. Consider the potential for developer contributions to improve the High Street e.g. shop front improvements. Establish a town centre development framework with provision for new retail development at The Centre/Town Hall site, including a good quality public space capable of accommodating a market and other activities.

Market Towns - Midsomer Norton	
Creating the conditions for success	Develop a public realm and movement strategy for the town centre. Consider the potential for developer contributions to improve the High Street e.g. shop fronts.
Management and Information	Linked to clarification of town centre management arrangements, develop a programme of town centre activities to promote the town and attract customers.
Development	Open dialogue with the main food store operators in the town centre to discuss future intentions and the potential for expansion of existing town centre stores.
	Establish a town centre development framework with provision for additional convenience floorspace and medium-large comparison units at the Palladium and adjacent land.
Market Towns - Radstock	
Creating the conditions for success	Develop a public realm and movement strategy for the town centre
Development	Establish a positive planning framework for the town centre. This should promote redevelopment of the Radstock Co-operative Society store either on the existing site or preferably in a more central location to provide a better quality convenience offer. It should also seek to use both development of this site and of the former railway land to create a more integrated centre. If the short-medium term convenience floorspace needs cannot be met in the main market town of Midsomer Norton, consideration should be given to convenience floorspace growth in Radstock.
City of Bath	
Improving the existing retail area	• Develop an action plan for incremental implementation of the Public Realm and Movement Strategy, as far as possible focussing initially on the areas identified as priority within this Retail Strategy. • Manage street entertainment to ensure high quality provision in appropriate locations. • Review street trading pitches and aim to de-clutter the central 'retail spine'. Improve the quality of street trading stalls. • Introduce low cost family entertainment into the public realm drawing from European examples such as chess, table football, children's games. • Commence a review of the location of the Tourist Information Centre and the long term potential to introduce café/restaurant use into the Abbey Chambers premises. • Further develop and enhance the shopping section of the www.visitbath.co.uk website including information on shops in the city centre, particularly independents, drawing on good practice examples from elsewhere e.g. www.marylebonevillage.com • Investigate the potential and feasibility of a Business Improvement District as part of the City Centre Management initiative. • Consider how the Council might, through its commercial estate management, link with city centre management activity to help facilitate development, promotion and monitoring of the retail sector.
Accommodating Growth	• In relation to the Southgate development, through the West at Work project (www.westatwork.co.uk) establish a skills and jobs offer that can both help maximise the number of local people employed in the new development and enhance retail skills across the city Engage with landowners and occupiers to develop delivery plans for key city centre sites to: • Investigate the potential and feasibility for an innovative approach to the Green Park Station site to deliver a new larger convenience store. • Establish a development concept and feasibility assessment for the Podium/Hilton/Cattlemarket and Broad Street Car Park sites, within the context of the wider 'Milsom Street block' stretching from Queen Square to the river.

	• Establish a development concept and feasibility assessment for remodelling the City of Bath campus, incorporating provision for future additional convenience/comparison floorspace. • Establish a long term movement and parking strategy to support a high quality city centre retail environment.
Managing Investment	Undertake a pilot in relation to potential landlord collaboration for managed investment by engaging with key landowners in the 'Milsom Street block' to explore the potential scope and remit of such an approach.
Neighbourhood Centres	Undertake a 'health check' audit of each centre and develop action plans.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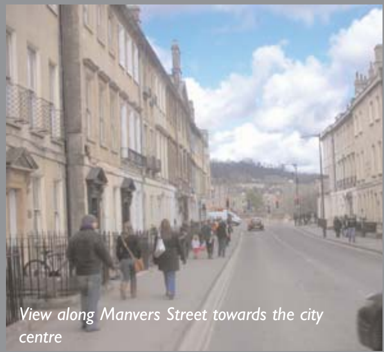
Appendix: Key Bath City Centre opportunity sites and connectivity

Southgate development. Source: Multi Development UK Ltd

Southgate

The Southgate area of Bath City Centre is currently under construction to create a new retail quarter with a mix of shops, leisure facilities, restaurants, homes and a new public transport interchange. The 3ha site is situated adjacent to Bath Spa rail station and will incorporate a series of newly designed streets and public squares in order to provide a better link to the main retail axis in the City Centre.



View along Manvers Street towards the city centre

Manvers Street

While Manvers Street is close to the new Southgate development, it lacks active frontage and visual connectivity with existing retail areas. Consequently, the area is not considered a key location for future retail growth.

The rear of the Forum

The Forum

The Forum is a former cinema immediately opposite the new Southgate development. Currently the building is in use as a church and for a variety of events. There is some ground floor retail use associated with the curch use. However, the building does not provide significant opportunities for developing and enhancing retail connectivity and as such is broadly unsuited to retail use.

View to Avon Street car park from Southgate

Avon Street Car Park

While close to the central shopping area, Avon Street Car Park is not linked to current retail circuits and visual connectivity is very limited. It could however have potential for some ground floor retail provision if a link to James Street West is established as part of future development of the City of Bath College site.

From Avon Street towards the coach park

Avon Street Coach Park

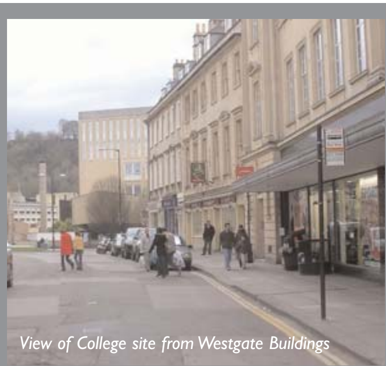
Avon Street Coach Park is something of a cul de sac in terms of retail connectivity. It is bounded on two sides by residential properties and on a third by the River Avon. The site does not provide significant potential for developing and enhancing retail circuits related to existing retail areas and the areas for expansion proposed in this strategy.


Break in frontage at the College site

City of Bath College

City of Bath College is situated in a key location. It currently presents a break in the active frontage on St James' Parade/James St West. However, the site is highly visible from existing retail areas and presents significant potential for developing current retail circuits.

A potential option to relocate the City College elsewhere in an expanded City Centre would release this site for redevelopment. The majority of the site would most likely be developed for residential and employment use, but potential exists to incorporate retail and ground floor levels on the main street frontages. An alternative


View of College site from Westgate Buildings

option could be to redevelop the College on the site for college use, incorporating some ground floor retail. This latter option is more likely to be delivered.


Looking down James St West towards City of Bath College

James Street West

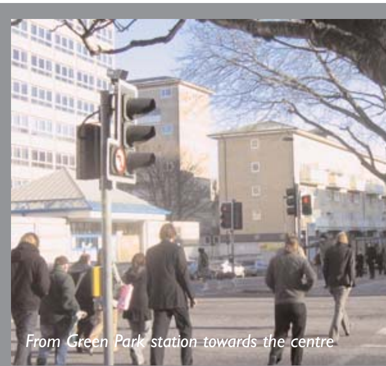
James St West has developed significant active frontage, with good visual connectivity and is an important pedestrian link to the retail area at Green Park Station. The link is however weakened by the inactive frontage on the junction opposite Green Park Station. This and other sites along James Street West present significant opportunities for building upon existing retail circuits.


Green Park

Green Park Station

In the early 1980s, the attractive Georgian style station buildings were restored to their original condition by J Sainsbury plc, and today the station and environs contain a mid-sized Sainsbury's supermarket, with associated car parking, along with a variety of local crafts-people and traders. In general however, it is recognised that Green Park Station is very much under-utilised, particularly given its outstanding mid-Victorian railway architecture and waterfront presence.

The key attributes of the site are its location between the proposed new residential community and other uses at Bath Western


From Green Park station towards the centre

Riverside and the city centre, its inherent character and its current function as a retail draw by virtue of the supermarket on the site. Pedestrian connectivity to the immediately adjoining Homebase store at the eastern end of Bath Western Riverside is good. James Street West is undergoing change and developing an improved and more active connection to the city centre. There is however, a need to cross Green Park Road.

The Homebase site approached from Green Park Station

Bath Quays South looking towards Riverside Business Park.

Cattlemarket site in the foreground, adjacent to Hilton hotel

Broad Street opposite the Hilton Hotel

From Broad Street car park to Broad Street

Bath Western Riverside East
This is an out of centre site immediately adjacent to the edge of centre Green Park Station site. It is occupied by a Homebase large format store with a pedestrian footbridge over the River Avon connecting the site to the Green Park Station site and the Sainsbury superstore. The site is suited to retail formats that cannot be accommodated in the centre and has the potential for an intensified and mixed use form of development to take advantage of its river frontage, its location between the city centre and the new residential community proposed at Bath Western Riverside, and the proximity of the proposed bus rapid transit route.

The Bath Quays South and Riverside Business Park/Travis Perkins sites
These sites are separated from the city centre by the River Avon with no current connectivity to the existing retail area. These sites are not considered to offer any significant potential for enhancing city centre retail circuits.

Cattle Market-Hilton-Podium
The Podium forms an integral part of the central retail area. However, north of this the current Hilton Hotel and Cattlemarket site present an inactive frontage which disconnects the quirky independent retail area of Walcot Street from the centre. This area has a high potential for visual connectivity and development of existing retail circuits.

This series of sites occupy a prime location between the river and the primary north-south retail axis. At present, however, the Cattlemarket site is occupied by a surface level car park and fails to take advantage of its location. Adjacent to the site, to the south, are the Hilton Hotel and Podium Shopping Centre, which similarly make no contribution to the waterfront setting, and, within the context of the City Centre, are very poor architecturally. The opportunity exists within the Cattle Market site therefore for major redevelopment. This could make a significant contribution to the waterfront and may open opportunities to make much stronger east-west links, which are currently limited in the City Centre, as well as strengthening Walcot Street.

Broad Street Car Park and King Edward's School
Broad street car park is located between Milsom Street and Broad Street and presents a real opportunity for further enhancing the connectivity between these two retail frontages and the distinctive offer in this part of the city. Future development could be of a similar nature to Milsom Place, linked to reuse of the adjoining former King Edwards School, perhaps as a boutique hotel with some small scale retail to the rear.

Internal courtyard at Milsom Place

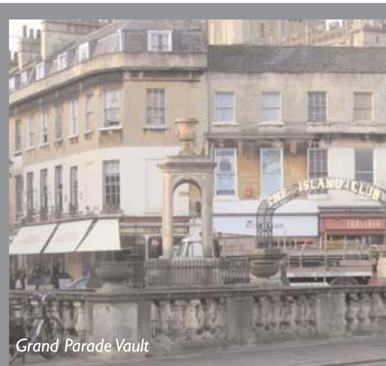
Milsom Place
Milsom Place is an exemplary infill new development and refurbishment that has in effect provided new streets connecting Milsom Street with Broad street to enhance retail circuits and the distinctive retail offer in this part of the city. There is potential for linking this development to future development of Broad Street car park.

Sawclose

Sawclose
Sawclose is in the heart of the city with good connectivity. It is however located directly opposite the Theatre Royal in an area characterised by leisure and entertainment uses and has the potential for creating a key public space in the city. Current landowner discussions are ongoing for a development to build upon the existing character and realise the opportunity for a vibrant public space. Such a development would complement the retail offer. Consequently the site is not considered to have significant retail potential.

Empire Undercroft

The Empire Undercroft
The Empire Undercroft is below street level adjacent to the river. It is close to the retail area of Pulteney bridge and has potential for café, restaurant and some retail use. However, given the nature of the opportunity it is not considered a significant location in terms of accommodating future retail growth.



Grand Parade Vault

Grand Parade Vaults
The underground vaults present an exciting opportunity for uses that could complement the retail offer. The above ground element of the site is well connected to the existing retail area and formerly accommodated a building. Any future building could accommodate reatil use but this will be dependent upon proposals for the vaults. The site has consequently not been identified as having significant retail potential.

Gainsborough Hotel site

Gainsborough Hotel
This is a central site with good connectivity. However, it has planning permission for a spa hotel and work has commenced. Consequently, the site has not been identified as having retail potential.