

## VIABILITY & DELIVERABILITY ADVICE

Weston Town Centre Area Action Plan

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Prepared for



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## 1. EXECUTIVE SUMMARY

- 1.1 GVA Grimley Limited was commissioned to undertake viability and deliverability advice to support the production of the Weston-super-Mare Town Centre Area Action Plan (TCAAP). There is a requirement to have external technical input to ensure that the delivery plan and Local Development Framework documents are robust in relation to deliverability issues.
- 1.2 The focus of this exercise is to view the overall strategy of the TCAAP approach with particular reference to the following points:
- General advice on site viability – both in current and potential future markets, including advice on future trends in town centre uses, particularly in the retail and leisure sectors.
  - Advice on what type of retailers would be attracted to the town and suitability of alternative sites in the retail and leisure sectors.
  - Advice on the amount of employment development proposed in the AAP and on the employment led strategy as an approach.
- 1.3 Undertake specific viability assessments for the priority sites identified in the AAP based on the current proposals set out for each of the key sites and report our key findings and recommendations.
- 1.4 We have included a summary of current property market conditions in the town, together with indicative transactions which we have reflected in our viability appraisals.
- 1.5 **Victoria Square** - Our development appraisal shows that the redevelopment of Victoria Square shows a significant deficit due to the high value of the existing uses. In addition there are some 17 separate ownerships making land assembly difficult without the use of compulsory purchase powers. Furthermore a number of the buildings which would need to be demolished contribute to the streetscape and their removal would be unfortunate. On the demand side this Square does not enjoy High Street frontage and would rely to a large extent upon footfall from within the Sovereign Shopping Centre. Nevertheless there is a need to plan for retail growth in the town centre and we have considered Dolphin Square and Town Square as alternatives to Victoria Square.
- 1.6 **Dolphin Square** – A comprehensive redevelopment of Dolphin Square is overdue as the existing retail/leisure offer is tired and in need of improvement. There is interest to redevelop the site as a retail and leisure centre with hotel and cinema. Whilst Dolphin Square is an important gateway to the town centre and beach it is physically removed from the prime retail area which is centred on the High Street and Sovereign Shopping Centre.
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We do not consider the town has the catchment area or size to support two retail centres. We consider that Dolphin Square lends itself to a range of uses to include leisure, (such as hotel, tenpin bowling, cinema, restaurants, bars) residential, offices and community use. The location is unlikely to attract the quality of multiple retailers required to enable a retail led scheme to be financially viable. It is possible that this location could become more of a leisure destination with uses such as cinema, restaurants, hotel and some residential but this will also require sufficient car parking allocation. The proposed redevelopment of **Tropicana** may also have a bearing on the demand for Dolphin Square as a leisure destination as there is unlikely to be sufficient demand for both. The long leasehold /part freehold interest of Dolphin Square is currently under offer and we understand a retail and leisure led scheme is currently being considered. We recommend that the proposed retail content of 8,000 sq m at Dolphin Square be reduced to circa 5,000 sq m to include restaurants. We consider that the site lends itself to phased redevelopment, in response to market demand and as the current premises become vacant.

- 1.7 **Town Square** – This is not a site identified within the AAP for redevelopment, however we suggest it as a suitable alternative site for retail expansion. Town Square is adjacent to the Sovereign Shopping Centre and the High Street. This site would enable the prime retail area of the town to expand whilst retaining High Street frontage albeit separated by the Italian Gardens. To date the Council has, understandably resisted development on this site preferring the alternative Victoria Square, however for the reasons outlined above the latter is not a viable or deliverable option. There is also considerable open space available within the town centre on Beach Lawns and on Pier Square following the civic pride enhancement works.
- 1.8 The long leasehold interest of the **Tropicana** is currently on the market with several expressions of interest. The pool requirement has reduced which should result in a scaling down of the development proposals. We do not consider that a redevelopment of the site to include a swimming pool is commercially viable without subsidy in the current market. We consider that there is merit in retaining the existing buildings fronting the Promenade for café/retail use because this provides an active and interesting frontage facing the town.
- 1.9 **Tesco Site** - The Tesco store, situated on the edge of the town centre at circa 4,500 sq m, over trades principally due to the constrained site and its proximity to the town centre. Tesco would like to increase the retail floorspace but not at the expense of car parking which is already inadequate. Redevelopment of the site is not practical due to the disruption of trading and the relocation of 32 occupied flats which are above the existing store. A frontage extension to the existing store is an option potentially to include some decked car parking. There is unlikely to be capacity to incorporate a landmark building along Francis Fox Road

as required by the TCAAP, however some form of public artwork could create an alternative point of interest.

- 1.10 The main office occupiers in the town are housing associations and local Government with the Council scheduled to vacate 22,500 sq ft at Dolphin Square in 2011 to relocate to Clevedon. The town has a strong emphasis on leisure and tourism and historically has not tended to be viewed as an office location. There is however scope to promote inward investment into the town both at edge of town locations such as Locking Parklands and Weston Airfield and the centre. The town has good connectivity by road and rail, workforce availability and an attractive quality of life in North Somerset. We recommend that town centre office development is focused upon an available site close to the railway station. This site could then be promoted to potential requirements as an alternative to edge of town locations.
- 1.11 **Gateway Sites** – at present the TCAAP proposes a plethora of employment space on the Gateway sites totalling 83,000 sq m which is similar in quantum to Bristol's Temple Quay. This is in excess of the level which can be sustained for Weston-super-Mare town centre particularly given the level of out of town allocations.
- 1.12 We recommend that offices are encouraged towards the most suitable of these sites, **Sunnyside Road** with reduced levels on the remainder. The **Rugby Club site** lends itself to a mixed use residential led scheme potentially to include some of the adjoining playing fields. A potential relocation site for the rugby club is the **Avoncrest site**. This site has high remediation costs due to its historical use as a waste tip and despite being promoted for a variety of uses remains substantially undeveloped. The remediation strategy is containment rather than removal which lends the site to uses which minimise ground works. Relocation of the Rugby Club to the Avoncrest site would enable the existing allocation of housing, 600 units, to be in part allocated to the Rugby club site (2.4 ha) together with part of the adjoining playing fields, say southern section extending to 2.8 ha which are owned by the Council. These two landholdings could provide capacity for 250 housing units. We recommend that the **Gas Works Site** is removed from the list of priority sites as we are advised by the National Grid that these works are likely to remain operational for the foreseeable future and that the remainder of the site forms a development exclusion zone. Similarly the **Train Station Car Park** site is not available for redevelopment without the provision of replacement car parking. Network Rail are unlikely to decommission this land whilst it is operational. **Locking Road Car Park** is currently a long stay car park and coach park. Development would require the construction of a multi storey car park, which is not viable in the current market. This is also not a prominent gateway site and is elongated reflecting its former railway use. We consider that development should be directed to more prominent

deliverable sites. The **Sunnyside Road** site is allocated for mixed use high density development and is a prominent undeveloped gateway site next to the railway station. We consider that this site should be promoted for employment led development and could accommodate a headquarters office requirement up to 10,000 sq m.

1.13 In conclusion we recommend the following revisions to the TC AAP:

1. Town Square should be allocated for expansion of the retail provision linked in to the Sovereign Centre with frontage to the Italian Gardens. Victoria Square should be removed as an area of focus for retail expansion as it is neither viable nor deliverable.
2. Dolphin Square should continue to be promoted for mixed use redevelopment but reducing the quantity of retail on any redevelopment from 8,000 sq m to 5,000 sq m. A number of leisure uses which were formerly proposed by Henry Boot scheme at the Tropicana would be better accommodated on this site. These included cinema, children's play centre, bowling and a hotel.
3. The Tesco site is constrained in terms of size and ownership which limits its redevelopment potential. There is potential to provide an extension to the foodstore possibly in conjunction with decked parking.
4. Reduce the proposed employment in the gateway sites from the 83,000 sq m proposed to circa 10,000 sq m principally at Sunnyside Road. Remove a number of the sites which are not appropriate for redevelopment, namely Locking Road Car Park, Train Station Car Parks and the Gas Works site.
5. Change the proposals for the Avoncrest site which is heavily contaminated to Sports Leisure with a view to accommodating the Rugby Club and associated training grounds. Allocate the Rugby Club site and about 54% of the adjoining playing fields to housing. Consider relocating some of the playing fields at Hutton Moor to the Avoncrest site and allocate the former for residential.

## 2. INTRODUCTION

- 2.1 The Weston-super-Mare Town Centre Area Action Plan was approved for consultation in July 2009. The TCAAP provides detailed policy guidance including specific proposals for key sites within the town centre and gateway areas for Weston. We have been instructed by North Somerset Council to provide viability and deliverability advice on the overall approach and guidance on specific policies and priority sites.
- 2.2 We first examine the current property market conditions within the town and discuss the various sectors within the market and where demand is likely to arise. We have been asked specifically to comment on the retail strategy and the suitability of an employment led approach to redevelopment in the town.
- 2.3 We have considered the priority sites within the AAP and provided viability assessments based on the preferred options for development outlined in the document. The appraisals are attached at Appendix III together with the general and site specific assumptions we have made. We have provided sensitivity analysis by increasing potential values to reflect improvements in the market based on our optimistic values from the peak of the market in mid 2007 and have also put forward alternative development proposals to increase potential viability. The TC AAP provides a long term strategy for the town until 2026 and we have considered the long term prospects for the town. The cyclical nature of the property market means that values and demand are likely to improve on an upward cycle in the short to medium term, and a further full cycle may occur before the end of 2026. Given the severity of the current recession and the more cautious lending approach from the banks, we would not anticipate property values in real terms greatly exceeding those achieved at the recent peak in the market in mid 2007.

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### 3. MARKET CONDITIONS

3.1 In the following sections we provide a summary of current market conditions of the property sectors within Weston-super-Mare together with information on supply and demand. We have also highlighted recent transactions and likely values that could be achievable for completed new developments in the town. This information provides a background to the end values we have assumed could be achievable when undertaking our viability assessments of the priority sites.

#### Retail

- 3.2 Weston-super-Mare is a sub-regional centre providing convenience and comparison shopping to the North Somerset area as well as the seasonal influx of tourists. Its main competitors for both retail and leisure spend are the regional shopping facilities at Cribbs Causeway in South Gloucestershire, Bristol city centre, and smaller retail centres such as Taunton and Street.
- 3.3 Weston's prime retail pitch is considered to be on the High Street around the entrance to the Sovereign Centre, where prime headline rents at the peak of the market were in the order of £95 per sq ft Zone A in the High Street, now circa £80 - £85 per sq ft Zone A on short term leases with significant incentives. It is generally recognised that retail units are valued using the 'zoning' method to recognise that the most valuable part of a shop is that closest to the window/street. Therefore the first 6.1m (20 ft) of the unit, known as Zone A, is valued at twice the next 6.1m (20ft), Zone B. This in turn is valued at twice Zone C and the remainder valued at a rate based on comparable evidence. The rental values quoted for retail units are therefore stated as £ per sq ft in terms of Zone A.
- 3.4 Secondary retail is situated on Regent Street, Waterloo Street and Dolphin Square and out of town retail is centred around Winterstoke Road, home to Weston Retail Park, Gallagher Retail Park and the recently opened Flowerdown Retail Park, where occupiers include B&Q, Comet and Sportsworld.
- 3.5 Weston-super-Mare town centre faces competition from competing retail centres such as Bristol, Taunton and Bath. The town would benefit from more complementary leisure facilities such as a multi screen cinema or national restaurants such as Pizza Express in order to attract a wide range of shoppers and retailers from a wider geographical area.
- 3.6 In the Sovereign Shopping Centre, at the peak of the market rents were in the order of £87.50 per sq ft Zone A, with the difference between the Centre and the High Street explained in part by the presence of a service charge where this would not be paid in the High Street. At that time the shopping centre was fully let. In late 2008 and early 2009 a

number of tenants within the centre were placed in Administration and subsequent potential voids at a time when retail demand nationally was low meant that the landlord needed to adopt a proactive approach to filling voids. They did this in part by agreeing a number of lettings for 12-18 months at concessionary levels and in some cases providing a substantial discount to previous rents passing. As a result occupancy was largely maintained.

- 3.7 This approach was adopted for units 5 (Mountain Warehouse), unit 8 (GimmeGizmo), unit 12 (CMD) and units 14/15 (Internacionale) and unit 16 (Past Times). However, a number of these retailers are now in discussion with the Landlord to try to convert these short term lettings into permanent ones.
- 3.8 More recently a new tenant has been found for Unit 6, which has been let to Blue Inc at a rent of £80,000 pa on a five year lease with 3 months rent free. This rent equates to £77 per sq ft Zone A. In addition, Pastimes is converting its short term lease to a ten year lease, with five year break and 6 months rent free at rent slightly in excess of £50 per sq ft Zone A, reflecting its more secondary location within the shopping centre.
- 3.9 As mentioned above, rental values in the prime section of the High Street between WH Smith and Santander are currently in the order of £80-£85 per sq ft, down from its peak of approx. £95 per sq ft and values gradually reduce as you move along the High Street to close to £50 per sq ft at its junction with Waterloo Street.
- 3.10 The section of the High Street beyond Regent Street is considered to be good secondary, and has historically attracted retail values of in the order of £25 - £35 per sq ft Zone A. However, there are a number of vacant units to let that have been available for in excess of 18 months and are unlikely to achieve in excess of £25 per sq ft. A recent rent review in Oxford Street last year was agreed at less than £20 per sq ft Zone A.
- 3.11 Dolphin Square comprises a 1960s pedestrianised shopping precinct with 14 retail units and an indoor market situated at the southern end of High Street. The centre is perceived by retailers as a secondary pitch and is dominated by small independent retailers and a number of charity shops on short term leases. It remains well-let albeit with some rentals ranging from £10-12 per sq ft Zone A (Units 4 and 38) up to £21.50 per sq ft Zone A (Unit 22).
- 3.12 There have been few lettings of bars and restaurants in the town and we are not aware of any transactions with the exception of Bottelino's on Waterloo Street, which opened last year in the town. Our recent marketing of the Tourist Information Centre indicated some interest from national chains such as Pizza Express.
- 3.13 The trend in the retail market in recent years has been for larger store requirements. Retailers, faced with competition from both large supermarkets and internet sales have

looked to upsize in order to offer, wherever possible, the full range of goods that customers can get elsewhere. This is in part why an increasing number of retailers who have traditionally been located on the High Street, are now looking to locate out of town, as Next has done. In addition to the limited fashion offer they have in the town centre, they can offer the full range of men's, ladies and children's clothing and the "Home" offer in a unit of 10,000-20,000 sq ft.

- 3.14 Weston-super-Mare has a fairly strong out of town retail offer with the Gallagher Retail Park, Weston Retail Park and the recently opened 100,000 sq ft open A1 Flowerdown Retail Park. Rents in Flowerdown range between £14 per sq ft and £23 per sq ft with historically rents in the other two retail parks being between £15 and £18 per sq ft.
- 3.15 In summary, the market conditions in Weston-super-Mare reflect the national conditions, with supply outstripping demand for most sectors of the retail property market and incentives having increased considerably over the last few years. There is some existing demand for the town centre which is likely to increase as the economy and market recovers. Potentially we consider that there is scope to increase retail space in the High Street by 80,000 – 100,000 sq ft to include a department store.

### Leisure

- 3.16 Weston-super-Mare is an established resort town which still attracts a large number of visitors particularly during the summer months. The long awaited opening of the new Grand Pier will greatly assist the leisure offer and there is potential to increase the offer further as demonstrated by the previous occupier interest in the Henry Boot Tropicana scheme.
- 3.17 The leisure facilities at the Tropicana and Birnbeck Pier are now closed awaiting redevelopment. The Tropicana redevelopment proposal is currently being promoted for mixed leisure use to include a reduced sized swimming pool with interest being received from two parties.
- 3.18 The town centre currently provides a 4-screen Odeon cinema on Regent Street and ten-pin bowling within the Dolphin Square Shopping Centre. The town also has a Seaquarium Centre along the waterfront area of the town. In terms of provision for the arts, the town provides both a museum and the Playhouse Theatre. The town also provides leisure facilities at Wyvern and Hutton Moor respectively and a number of pubs/bars and nightclubs.
- 3.19 We recommend that leisure development be concentrated on Dolphin Square, which already has a tenpin bowling facility (albeit in need of upgrading) and is strategically located on the edge of the town centre. This site is also closer to the town centre and environmentally more

suitable than the Tropicana. Uses could include cinema, ten pin bowling, hotel, restaurants, cafes and kids play.

- 3.20 Weston's coastal location and accessibility provides the opportunity to incorporate leisure uses that complement a seaside town and include all weather leisure facilities such as the Pier and Seaquarium. Additional opportunities include a leisuredome, multi screen cinema, bowling, kids play and increased hotel provision.
- 3.21 Cinemas/Bowling – the cinema market is reportedly strong with 3D films boosting takings by 8% on last year (source BBC) and most operators showing healthy results with the growing popularity. However we expect few new cinemas to open this year due to the economic slump and difficulty in raising development finance. Cinemas do not generate significant land values, but draw in other occupiers, consequently they are relatively land hungry and schemes generally need a strong property investment market to be viable.
- 3.22 We understand a 4D cinema is planned for the pier; this is single screen with 50 seats. The 4D element appears to be a novelty of moving seats, water sprays and so on. We are aware of active demand for a multi screen cinema in the town and we understand this is likely to be a 6 – 8 screen cinema extending to between 1,858 – 2,323 sq m (20,000 and 25,000 sq ft). AMF Bowling has a potential tenpin bowling requirement of 1,394 sq m (15,000 sq ft) which would replace their existing facility in Dolphin Square.

### A3/A4 Operators

- 3.23 Weston-super-Mare has some demand from bars and restaurants for town centre. We are aware of expressions of interest from Frankie & Benny's, Costa Coffee, Caffé Nero, Pizza Express/Ask/Zizzi and there are out of town requirements for Greggs Plc and Dominos Pizza at West Wick. This is approximately half the requirements that we were aware of at the peak of the market but highlights that there is still active demand.
- 3.24 Rental values for bars and restaurants in the town are likely to be in the order of £161.46 - £215.28 per sq m (£15 - £20 per sq ft) for new build premises.
- 3.25 Prime yields in the town for restaurants/pubs/bars, assuming a letting to a national operator, are likely to be in the order of 7%.
- 3.26 Several hotels in the town have closed in recent years and been converted for alternative uses including residential accommodation, sheltered housing and community uses. The previous over-supply is likely to have driven down quality and prices and the reduction in some of the less established rooms can be seen as an advantage to the town and of benefit to the future of the remaining guest houses and hotels.

- 3.27 Whilst the Winter Gardens conference centre was aimed at attracting overnight stays, to date the town does not have any hotels of a size or quality to cater for the numbers of people that major conferences would attract.
- 3.28 There is interest from budget hotel operators for a 60 bed hotel in Weston extending to approximately 2,787 sq m (30,000 sq ft). However, the town would benefit from a larger, higher quality hotel investment to encourage conferences to the town.

### Offices

- 3.29 Weston-super-Mare has a population of 71,758 (2001 census) and up to 36% of the economically active population commute from the town primarily to Bristol. (Source NSC)
- 3.30 The town does not have an established office market and is characterised by smaller suites in converted buildings and infill development at Worle and Flowerdown. Supply and demand for the area is generally low, albeit when NSC vacates its Dolphin Square offices in November 2011, supply will increase although with redevelopment the offices may be replaced by other uses. Demand for the town as an office location is currently low, partly as a result of the economic climate but also because there are easily accessible alternatives at Clevedon and the outskirts of Bristol. Notwithstanding this the town has good motorway and railway connection, is close to an international airport and has a good labour pool. We consider that appropriately allocated and promoted sites should attract occupier interest as the economy improves.
- 3.31 With regards to new office developments in the area, in the past the supply of land has been very limited with few office developments being undertaken for some time. There are now four main sites on the outskirts of town namely Western Gateway Central, Weston Gateway North, Locking Parklands and Weston Airfield. The first two sites are further ahead with Weston Parklands not yet being deliverable. The Weston Gateway sites offer new campus style office parks situated adjacent to Junction 21 of the M5, offering space ranging from 3000 sq ft (279 sq m) to 390,000 sq ft (36, 231 sq m) and is one of two sites given consent for office development in the area.
- 3.32 As it stands at present, office rents achievable are down from £15 per sq ft. New build rents for the sites above are quoted at between £14.50 -£16.50 per sq ft and achievable rents are in the region of £12-£13 per sq ft; secondary stock we believe to be in the region of £10 per sq ft. Freehold values for new offices at the Weston Gateway sites are between £180-225 per sq ft. The agents have reportedly received enquiries but these have not proceeded to date.

- 3.33 Morston Court comprises new purpose built office accommodation just off the A370 on the edge of town. The eleven 1,500 sq ft units took 2.5 years to let or sell with asking rents starting at £13.50 and achieved circa £12.00 per sq ft. This is a reasonable take-up rate for the number of units and we could expect this to return when the market improves, particularly for smaller SME units. In the current market there is unlikely to be any speculative office development. St Modwen plans to build three 2,000 sq ft speculative units at Locking Parklands in Spring 2011, dependent upon HCA grant funding.
- 3.34 The most recent central letting was undertaken at 27-31 Boulevard, located just off High Street, in the centre of the town. The first and second floors are newly refurbished, self-contained offices with air conditioning and have 10 car parking spaces. The quoting rent was £15.50 per sq ft and although we cannot confirm the details of the letting because the owner negotiated with the incoming tenant direct. The agent believes the transaction is likely to reflect £12.50 per sq ft.
- 3.35 Demand for offices has historically been from local indigenous firms, and whilst there is no accurate source of information, our discussions of local agents indicate that any enquiries are for small suites. We recommend that a key site is identified in the town centre for offices in order that an inward investment opportunity can be directed towards a deliverable and suitable site.
- 3.36 To compare Weston to other towns in the Somerset, achievable office rents in Clevedon are estimated at circa £12.50 per sq ft for existing new build offices although quoting rents for pre lets are in the order of £16 per sq ft. Portishead has new office at Portis Fields with quoting rents of between £15.50 -£17.50 per sq ft and freehold prices of between £190-£195 per sq ft. Quoting rents for Express Park Bridgwater are £13.50 -£14.50 per sq ft rental and quoting capital values are £180 per sq ft. These are for prime office buildings where high build costs prevent developers from selling the accommodation for any less. Taunton quotes similar rentals in the region of £16.50 per sq ft and we are aware of a letting at this level at Blackbrook Business Park earlier in the year for a suite of 3,500 sq ft albeit incentives are likely to reduce the net the rental to below this figure.
- 3.37 We consider new offices built to Grade A specification (prime offices with air conditioning, raised floors, lifts, suspended ceilings with category II lighting) in Weston town centre could achieve values of up to £160 per sq ft capital value, reflecting rents of circa £13 per sq ft, subject to occupier demand.

### Industrial

- 3.38 The supply of land for industrial use has been limited and there has been limited speculative industrial development undertaken for some time. Industrial enquiries for the town are few

and all are for properties of less than 10,000 sq ft, mainly for storage or basic industrial properties.

- 3.39 Generally speaking there have been no sufficient indicators as to the strength of demand for the town due to the lack of supply of serviced land for immediate development. The area to date has not been recognized as an office or an industrial location, so any new schemes, which it can be said, would be “creating a market”, would need to promote and brand Weston-super-Mare as a location.
- 3.40 Available space is limited however presently ranges from new or refurbished space of 18,997 sq ft (1,763 sq m) – 156, 647 sq ft (14,553 sq m) situated at Westland Distribution Park and secondary space, which dominates the listings ranging from very small suites of 71 sq ft (7 sq m) up to units of 36,412 sq ft (3,383 sq m). Secondary space is located predominantly on surrounding roads around Winterstoke Road, Herliun Way and Queens Way, Worle with quoting rents ranging from £3.98 per sq ft (42.86 per sq m) - £8.50 per sq ft (91.49 per sq m), dependant on unit size, lease terms and location.
- 3.41 In common with most areas of the UK, it is doubtful anyone would build speculatively in the current market, moreover, there are unlikely to be requirements over 20,000 sq ft for the town. It is possible there could be demand for general industrial B1, B2 and B8 as most of the employment sites within the town require offices or research and development properties. However, the cost of the required infrastructure and servicing works required on the available sites remove most of the value from straightforward industrial developments. We anticipate values of approximately £60 - £65 per sq ft could be achieved for new premises.

### Residential

- 3.42 Weston-super-Mare retains many of its original Victorian and Edwardian properties and the residential market in the town centre comprises a large number of converted flats especially on the hillside. There are pockets of newer developments throughout the town especially in-fill and where older hotels and buildings have been demolished and redeveloped together with some modern apartment blocks along the sea-front. There has also been significant housing development along the A370 (Locking Village) and at Worle.
- 3.43 Local agents report that the residential market seems to have fared slightly better than the same time a year ago. However, PROMIS reports that prices for houses in Weston decreased at a faster rate between 2007-2009 than the average.
- 3.44 In line with the rest of the UK, there is more sustainable demand for new build houses rather than new flats. The two main new schemes in the town are the Persimmon schemes at West

Wick, Leete Park and Church Meadows, both on the outskirts of the town close to junction 21 of the M5. The agents report that most demand is for the larger home types, three and four bed semi detached and detached units rather than smaller terraced units and that the £250,000 stamp duty threshold forms a ceiling to the prices that can be achieved. Demand is reportedly good although mortgageability is holding many sales back and the agents are achieving an average of just two sales per month. Net prices after incentives that are being achieved are as follows:

Type	Size	Price	Analysis
2 bedroom with garage/parking	600 sq ft	£155,000	£258 per sq ft
3 bedroom with garage/parking	814 sq ft	£168,000	£206 per sq ft
3 bedroom large with garage/parking	900 sq ft	£180,000	£200 per sq ft
4 bedroom townhouse with garage/parking	1,180 sq ft	£180,000	£153 per sq ft
4 bedroom detached with garage/parking	1,200-1,450 sq ft	£220,000- £248,000	£171-£183 per sq ft

- 3.45 In summary, the housing market is currently ahead of where it was a year ago although we are aware that a number of housing developers are now reporting demand beginning to tail-off. Over the period until 2026, demand for housing in the town is likely to return and we would anticipate good developer demand for housing sites over the medium term. We have assumed values for housing averaging £180 per sq ft in the current market with values increasing to up to £300 per sq ft for some locations in the town in an improved market.

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## 4. RETAIL STRATEGY

- 4.1 The retail requirements projected for the town have been calculated on a quantitative and qualitative approach with calculations based on anticipated housing and economic growth amongst other factors anticipated over the plan period. These projections have changed since the calculations were last undertaken and our strategic retail property team are currently assisting with new figures. The growth anticipated is likely to have decreased dramatically, although at this stage it is not clear by how much. However, there remains demand for retail growth and expansion, in and out of town albeit to a lesser extent than was anticipated four to five years ago. We are likely to have further information on the anticipated retail requirement for the town as part of our planning department's retail study.
- 4.2 Weston-super-Mare does suffer retail seepage to competing centres such as Taunton, Bristol and Cribbs Causeway which all have an excellent range of retail offer and are within an hour's drive. Provision needs to be made for the town centre to expand its retailing provision, in order to enable Weston to respond to competition and compete effectively.
- 4.3 There are a number of potential retail requirements who can not currently be accommodated within the existing retail provision in the town centre. These include Debenhams, Primark, TK Maxx, River Island, Iceland, 99p Stores, H&M, and Brantano. In addition, there are a number of smaller/standard shop requirements from retailers such as Costa Coffee, Edinburgh Woollen Mill, Holland and Barrett, Caffè Nero, Pizza Express as well as potential relocations such as New Look and Poundland who have requirements to upsize. We consider that when market conditions improve a retail scheme of circa 90,000 sq ft would be viable in this location.
- 4.4 **Victoria Square** – Our development appraisal shows that the redevelopment of Victoria Square, even in a bullish market, shows a deficit due to the high value of the existing use. There are also significant planning issues with the 17 separate ownerships making deliverability difficult without the use of compulsory purchase powers. There is a need to plan for growth of retail provision in the town centre and we have considered Dolphin Square and Town Square as alternatives to Victoria Square.
- 4.5 **Dolphin Square** – A comprehensive redevelopment of Dolphin Square is long overdue as the existing retail/leisure offer is outdated and lacking in quality. We understand the site is under offer to McLaren Life and plans are being drawn up to redevelop the site for a retail and leisure centre with cinema and hotel. Dolphin Square is somewhat removed from the prime and good secondary locations of the High Street, Sovereign Shopping Centre and Regent Street and we question its ability to attract the quality of multiple retailers required to enable a retail led scheme to be financially viable. A leisure based scheme with leisure retail

and restaurant use could potentially be delivered but it would require car parking and in our opinion a write down in the value of the existing use value. We recommend that the developers are asked to present an appraisal to support the viability of their proposals. The proposed redevelopment of Tropicana may also have a bearing on the demand for Dolphin Square as a leisure destination as there is unlikely to be sufficient demand for both.

- 4.6 **Town Square** – This is not a site identified within the AAP for redevelopment, however we suggest it is considered as a suitable alternative site for retail expansion. Town Square is adjacent to the Sovereign Shopping Centre and the High Street and represents a potential site for retail development in the town centre, albeit the location is sensitive. We consider that all of the retailers mentioned above with requirements for the town centre would consider this location to be suitable as it could link into both the High Street and provide a natural extension to the Sovereign Shopping Centre. We envisage that the Italian Gardens would be retained under this option.

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## 5. EMPLOYMENT-LED STRATEGY

- 5.1 We have been requested to comment on the employment led strategy that forms the basis for the TCAAP for the gateway sites into the town and on the capacity of the town to create the demand requirement for this approach.
- 5.2 The floor space use table attached in Appendix II illustrates the proposals for space set out in the TCAAP. Of particular note is the employment total is 136,900 sq m, including office space of 86,900 sq m. The scale of such development can be compared with Bristol's Temple Quay which provides 90,000 sq m of office accommodation, which has been developed over 15 years, the majority of which were in a strong market.
- 5.3 Demand for the town for employment and office uses has generally been limited to local firms and any enquiries tend to be for small suites and occupiers' budgets reflect rents and capital for secondary rather than prime office accommodation. Whilst we consider that there is potential to attract office investment to the town centre we recommend that the quantum is scaled back to circa 10,000 sq m.
- 5.4 The identification of a suitable site in the town centre for offices such as Sunnyside Road could act as an additional site to attract inward investment to the town and would offer an alternative and therefore a greater choice for potential occupiers than the current availability at the edge of town locations by offering improved access to the mainline railway station.

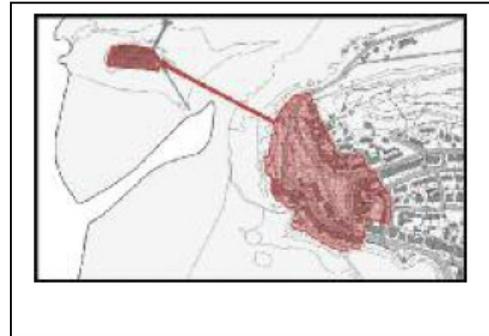
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## 6. SITE-SPECIFIC ISSUES

6.1 We have undertaken a viability analysis of the following sites having regard to the proposals in the Area Action Plan in order to advise on the deliverability and suitability of the proposed uses having regard to deliverability. We have assessed the following sites:

1. Birnbeck Island & Environs
2. Victoria Square
3. Dolphin Square
4. Tesco
5. NCP Car Park
6. Locking Road Car Park
7. Train Station Car Park
8. Sunnyside Road Site
9. Rugby Club
10. Gasworks
11. Avoncrest
12. Tropicana
13. Town Square

## Birnbeck Island & Environs



- 6.2 Birnbeck Pier, Island and Headland are located to the north of the main seafront and extend to approximately 2 hectares. The TCAAP includes the surrounding areas extending to 4.6 hectares. The property is largely derelict other than a RNLI station that is fully operative. The area identified in the plan includes the surrounding area including the former Royal Pier Hotel, existing residential properties, Prince Consort Gardens and car parking. It also includes the former Westcliffe College, comprising four detached period buildings that are currently under construction to provide apartments, some having been completed and sold off at circa £2,422 sq m (£225 per sq ft).
- 6.3 The property includes numerous listed structures amongst them the Pier which is Grade II\* Listed, and the clock tower, north jetty and toll house lodge which are Grade II Listed.
- 6.4 Urban Splash acquired the island, pier and headland in 2006 and in 2007 held a public design competition which led to the selection of a preferred design in 2008. The scheme design had the potential to incorporate residential, leisure and a hotel on the island. The deterioration of market conditions has placed the scheme on hold.
- 6.5 The regeneration of the island, pier and surrounding area is likely to significantly improve this area of Weston which has considerable potential to provide a high quality residential led environment with some leisure and retail accommodation on the pier and headland.
- 6.6 Our appraisal identifies that redevelopment of the island and headland incorporating restoration of the pier is unviable in the current economic climate however in an improved property market we consider that there is scope to make a quality scheme work although it will at best be marginal. However the costs to restore the pier and develop on the island are largely unknown. The site therefore needs further investigations and a feasibility study in order to establish the potential for bringing the pier into economic use.

### Recommendation

- 6.7 We recommend that this site is maintained as a key priority site within the TCAAP although it is unlikely to be viable in the current market. We recommend that a costings survey is undertaken to establish the development costs and restoration costs associated with the site. We consider the uses set out in the TCAAP to be suitable for the site and likely to create a marketable scheme in an improved market.

## Victoria Square



- 6.8 Victoria Square is bounded by St Margarets Terrace, Salisbury Terrace, Royal Parade and Regent Street and extends to 0.74 hectares.
- 6.9 The site is currently occupied by a crazy golf green in the centre with substantial 19<sup>th</sup> century buildings to the north and south comprising a range of uses including retail, bar, B&B, hotel and residential.
- 6.10 The site is identified in the TCAAP as a key opportunity to expand Weston's retail offer and provide connections between the High Street and seafront.
- 6.11 The aspiration is for the site to enable Sovereign Shopping Centre to expand and attract retailers who are not presently represented in the town or wish to relocate to a more central position.
- 6.12 Our assessment of viability identifies a significant deficit principally on account of high existing use values which have been separately assessed by Colliers in June 2010 in the order of £8m. Further difficulty arises in the deliverability of this site insofar as there some 17 landowners making land assembly for a comprehensive redevelopment scheme difficult to deliver without the use of compulsory purchase powers. Should CPO powers be adopted then assembly costs will escalate further to include additional heads of claims such as relocation costs, injurious affection and potentially business extinguishment. There is also a risk and delay associated with a CPO and without a robust viability case developers will be reluctant to fund such an approach and the CPO is at risk of being turned down.
- 6.13 Our sensitivity analysis indicates that even with bullish market conditions there remains a significant financial deficit. There are also planning risks associated with this option as it identifies the demolition of buildings which whilst not listed contribute to the streetscape of the town centre and their removal is likely to be controversial.

### Recommendation

- 6.14 Given the unviable nature of this proposal, multiple site ownership and planning risks we recommend that this site is removed from the list of priority sites and consideration is given to alternative locations to expand High Street provision.
- 6.15 We recommend consideration is given to redevelopment on the Town Square and we discuss this option further in a separate section below.
- 6.16 The central section of Victoria Square, currently used for crazy golf, could be improved as a requirement of the retail extension of Town Square providing a link between the seafront and the Sovereign Centre.

## Dolphin Square



- 6.17 The site is situated at the southern end of the High Street and includes Dolphin Square with its covered market and car park, former Sand's nightclub, the Oxford Restaurant and Takeaway (no 2a -2b Oxford Street), the Chicken Inn (nos 12 -16 Oxford St) and Carlton Street car park opposite. Dolphin Square is a tired secondary retail shopping centre of low build quality.
- 6.18 The total area extends to approximately 1.69 ha and is predominantly owned by North Somerset Council subject to a long leasehold interest which is currently being marketed and other private owners.
- 6.19 The TCAAP proposes replacing the existing office accommodation plus additional office space, 8,000 sq m of retail uses; bars, restaurants and cafes; leisure and residential with some community uses.
- 6.20 Our initial viability analysis indicates that redevelopment of Dolphin Square is not currently viable due in part to the cost of a multi storey car park and the relatively high existing use value. We understand that there is market interest in the site although we are not confident that the retail led scheme that is proposed will attract sufficient demand from retailers. We do not consider the site is suitable for an extension to the retail provision in the town and is more suitable for a leisure based scheme, which could be delivered on a phased basis.

### Recommendation

- 6.21 We consider that the site has potential for redevelopment as a leisure based site and recommend that it remains as a priority site for mixed use development, but with a reduction in retail floor space to 5,000 sq m approx.

## Tesco



- 6.22 The Tesco site is bounded by Regent Street, Walliscote Road, Station Road and Francis Fox Road.
- 6.23 The site area is approximately 3 hectares. Tesco is the predominant landowner with a number of additional ownerships of the retail units and Odeon cinema fronting Walliscote Road. There are two levels of residential accommodation above Tesco providing 32 apartments known as Hildesheim Court.
- 6.24 The TCAAP proposes an increase for the foodstore to include approximately 4,500 sq m of net additional retail space and a minimum of 2,250 sq m to be convenience retail.
- 6.25 Presently, this Tesco foodstore over trades with car parking which is frequently congested. Tesco would be interested in increasing the size of the store, which is currently approx 4,500 sq m, however the site is constrained and an extension would be challenging and probably entail two storeys at the frontage potentially to include decked car parking.
- 6.26 The preferred option in the TCAAP indicates that development proposals should provide for inter alia:
- *Strong frontage development along Francis Fox Road with a high quality designed corner development fronting Station Road roundabout. A landmark building up to six storeys in height would be appropriate on this corner.*
- 6.27 Given the site capacity constraints we doubt whether the site has capacity to incorporate a landmark building along Francis Fox Road although there may be scope for some form of public art.

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- 6.28 Comprehensive redevelopment of the site is unlikely to be viable due to a combination of disruption of trading, difficulty in finding a suitable alternative site for Tesco and the cost of relocating the residents of Hildesheim Court with suitable housing/compensation.

**Recommendation**

- 6.29 We consider that the site has potential for an extension of the Tesco foodstore, potentially to include decking of the car park. Comprehensive redevelopment is unlikely to be viable due to site constraints and trading implications.

## NCP Car Park



- 6.30 The NCP car park site is bounded by Regent Street and High Street extending to a site area of 0.6 hectares.
- 6.31 The land ownership includes NCP multi-storey car park and a number of retail units, offices and take away restaurant.
- 6.32 The site is in multiple ownership and the main landowners have not expressed an interest in redeveloping the site at the current time.
- 6.33 The TCAAP preferred option is to redevelop the site with a mixture of uses including approximately 7,000 sq m of comparison retail uses, residential uses above ground floor approximately 164 units, cafés and restaurants on the ground floor and offices above ground floor.
- 6.34 Our viability analysis indicates that the development proposals are currently unviable principally due to high existing use values associated with the multi-storey car park and surrounding premises. Although New Look occupy one of the retail units ideally they would like to relocate as this is not a prime retail pitch. Although the NCP car park is not well utilised this is partly due to their relatively high charges and should other car parks be developed in the town the importance of this car park could increase.

### Recommendation

- 6.35 We recommend that this site is given a medium priority in terms of redevelopment of the town centre due to high existing use values and lack of interest in redevelopment by the owners. However, the viability of this site is likely to improve when the existing use value reduces which is likely to be the result when some of the occupiers such as New Look or Peacocks relocate.

## Locking Road Car Park



- 6.36 Locking Road car park forms one of the number of priority sites within the gateway area. In September 2008 North Somerset Council commissioned urban design consultants to carry out some master planning for the gateway area of the town.
- 6.37 Locking Road car park is bounded by Francis Fox Road, Hildesheim Bridge Road, the railway line, Drove Road and residential developments along Locking Road. The site extends to 1.9 hectares and is in North Somerset Council ownership. Existing uses comprise car park, coach station and overnight lorry park.
- 6.38 Constraints of the site comprise its position adjacent to the railway line and Hildesheim Bridge and the need to relocate the current uses, car parking, coach and lorry parking.
- 6.39 The TCAAP identifies a potential to comprehensively redevelop the site for approximately 16,500 sq m of offices together with residential uses, approximately 80 units, and a well designed public multi-storey car park wrapped within the development to provide long stay car parking for the town.
- 6.40 Our analysis of the development proposals show a significant deficit principally due to the cost of providing a multi-storey car park. We are also concerned at the scale of development proposed and in particular the level of offices proposed. We consider that the viability would be improved by scaling down the level of development proposed, incorporating housing as opposed to apartments with a reduced quantity of offices. However even with these changes we doubt that it would generate sufficient value to fund a multi storey car park and replacement lorry/coach park.

### Recommendation

- 6.41 We recommend that this site is removed from the list of priority sites.

## Train Station Car Park



- 6.42 The Train Station car park is bounded by the A370/Station Road to the north, Hildesheim Bridge to the east, the railway line to the south and Station Road/Neva Road to the west.
- 6.43 The site extends to 1 hectare and is in the ownership of Network Rail.
- 6.44 The preferred option in the TCAAP is to redevelop the existing car parks in front of the station with a mix of uses including 11,500 sq m of offices, a small element of ancillary retail on the ground floor, car parking to serve the development as well as retain a taxi rank in front of the station.
- 6.45 We have assessed the viability of these proposals which are not presently viable nor likely to be even with an improvement in the market due to the cost of constructing replacement car parking as compared to the development value which would be released from surplus parking. In the absence of a strong viability case it is unlikely that Network Rail would entertain the development proposals as the land is not surplus to requirements.

### Recommendation

- 6.46 We recommend that this site is removed from the priority sites in the TCAAP.

## Sunnyside Road Site

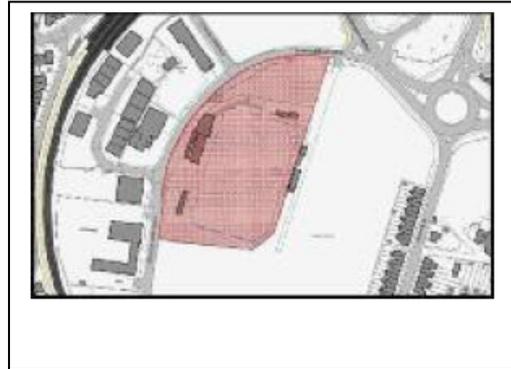


- 6.47 The Sunnyside Road site is bounded by Sunnyside Road to the north, Hildesheim Bridge and railway line.
- 6.48 The site extends to approximately 1.4 hectares and is in the ownership of AGM Holdings Ltd. The site is currently vacant land and has been used as a storage compound in connection with the pier works.
- 6.49 The TCAAP proposes a mixed use development on the site comprising approximately 17,000 sq m of offices, 50 residential units and some appropriate community uses. Our assessment of viability shows a significant deficit principally due to the scale of the development and uncertainty concerning demand for this scale of office development and apartments in this location.
- 6.50 This site is prominently located adjacent to the railway station and is available for redevelopment in single ownership. In an improved market and subject to demand we consider that it would be suitable for a landmark office building.

### Recommendation

- 6.51 We recommend that this site is allocated for a landmark office building with capacity for approximately 10,000 sq m and car parking.

## Rugby Club



- 6.52 The Rugby Club is bounded by Sunnyside Road North and Drove Road Recreation Ground. The site extends to approximately 2.4 hectares and is owned by Weston Rugby Club. The site adjoins playing fields owned by the Council which extend to 5.15 hectares.
- 6.53 The TCAAP proposes a mixed use scheme, subject to relocation of the rugby club, comprising approximately 19,000 sq m of offices together with approximately 100 residential uses and community uses.
- 6.54 Our analysis shows that employment use will not generate sufficient value to fund the relocation of the Rugby Club and in particular we question demand for 17,000 sq m of office accommodation in this location.
- 6.55 If the Rugby club were to relocate, there would be less need for the adjoining playing fields in this location, particularly if they were also to be relocated. If the southern section of the playing fields were to be included in a new residential community this would contribute a further 2.8 hectares which together with the rugby club could accommodate approximately 250 units.

### Recommendation

- 6.56 We recommend that the Rugby club site be extended to include the southern section of adjoining playing fields totalling 5.2 hectares and allocated for residential development extending to 250 units.

## Gas Works

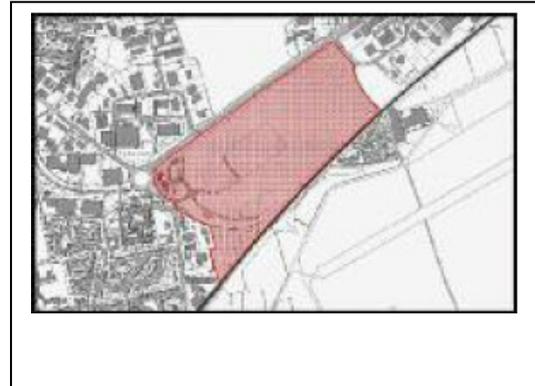


- 6.57 The Gas Works site is bounded by Winterstoke Road, Marshfields Way and Drove Road. The site extends to approximately 5.8 hectares however excluding the operational gas works the site area is 3.5 hectares.
- 6.58 National Grid Property Holdings Ltd owns the area of land surrounding the operational gas works and Wales & West Utilities own the operational gas works.
- 6.59 The TCAAP proposes a mixed use development comprising 19,000 sq m of offices and approximately 500 residential units with community uses.
- 6.60 We consider that the proposed uses are unviable on this site due to insufficient value being generated as compared to the cost of the development. We question the demand for offices in this location and the density of residential development proposed suggests apartments which would not be suitable in this location and for which there is currently limited market demand generally.
- 6.61 Whilst we have appraised a lower density housing only option the remediation costs associated with the former gas works still renders the development unviable. The owners have indicated that only temporary use would be permitted on the non-operational land due to HSE exclusion zones.

### Recommendation

- 6.62 We recommend that this site is deleted from the list of priority sites and reviewed at such time as the site becomes or is intended to become non-operational.

## Avoncrest



- 6.63 The Avoncrest site is bounded by Herluin Way to the north, the railway line to the south, Weston Express Business Park, refuse transfer station, industrial uses and a small triangle of residential use to the east and a mixture of uses including A3 restaurants, video shop and car wash to the west.
- 6.64 This is an extensive site comprising a former landfill site extending to 30 hectares. The freehold of the site is owned by North Somerset Council and leased to Avoncrest Developments Ltd on a long lease.
- 6.65 This site was formerly Weston-super-Mare's tip and therefore represents an extremely challenging brownfield site for redevelopment. The TCAAP proposes comprehensive redevelopment comprising a mixed use development of approximately 600 residential units, 10 hectares of employment and open space/sports facility extending to approximately 5 hectares.
- 6.66 Our appraisal shows a deficit based on the proposed uses principally on account of the high remediation and infrastructure costs which are estimated to be approximately £18.5m reflecting £620,000 per ha (£250,000 per acre).
- 6.67 Viability could be improved by reducing the employment use content and increasing the residential area however given the extent of contamination we consider that this site will need significant public sector deficit funding to enable comprehensive redevelopment to proceed. Given the contaminative nature of the site we consider that the site lends itself to uses which minimise ground works. As such it would appear a suitable site to accommodate the Rugby Club together with some of the adjoining playing fields. This strategy would have the advantage of unlocking a significant and prominent brownfield site, improving sports provision for the town and generating new homes.

### Recommendation

- 6.68 We recommend that this site is allocated for sports leisure and specifically identified as a relocation site for the Rugby Club.

## Tropicana

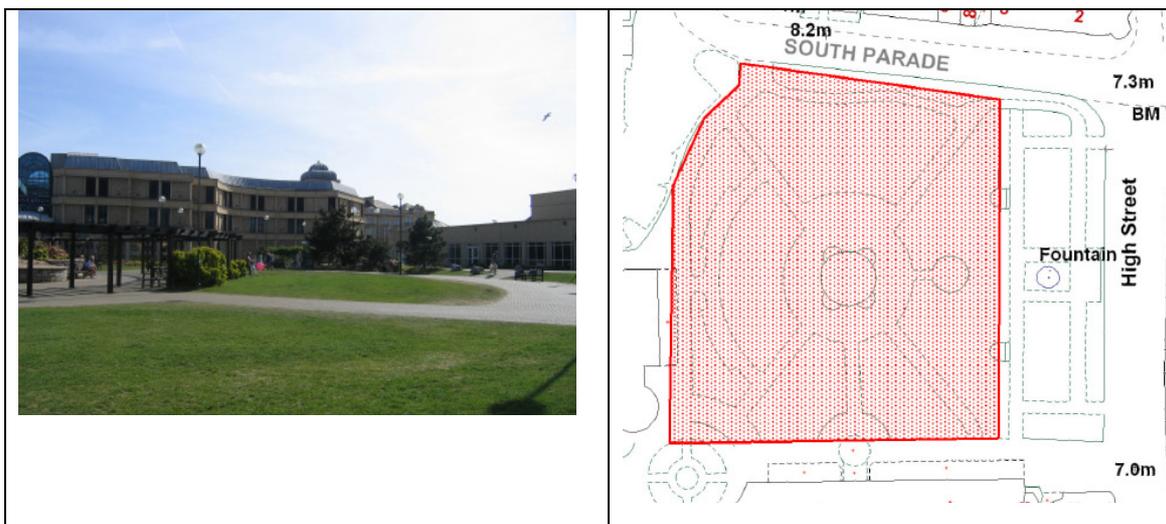


- 6.69 The Tropicana is located on the beach at the southern end of the seafront. It extends to 0.9 hectares and is owned by North Somerset Council.
- 6.70 The TCAAP provides for a mixture of uses including public swimming pool, leisure uses appropriate to its seafront location, restaurants, cafés and bars, hotel and car parking.
- 6.71 A comprehensive proposal was submitted in 2008 by Henry Boot comprising indoor fun pool, cinema and associated leisure facilities but ultimately Henry Boot withdrew with a slump in the property market.
- 6.72 North Somerset Council has recently re-tendered the opportunity and two proposals have been received the details of which are currently being worked up.
- 6.73 We consider that it will be challenging to make a redevelopment of this site viable, particularly if it is to include a pool (albeit the minimum pool size requirement has been reduced to 450 sq m). When the Lido opened in 1937 it was the largest in Europe and the Art Deco buildings fronting the Promenade still remain. Other lidos in the South West such as Jubilee Pool in Penzance and in Portishead have been retained and still act as tourist attractions with strong community involvement. Unfortunately, the cost of refurbishment will have increased with the breach of the wall to facilitate access for work storage associated with the Pier Square works and the pool has been filled in.

### Recommendation

- 6.74 In the event that the proposals which come forward are not viable we recommend that a feasibility study is undertaken to explore a range of options including refurbishment and redevelopment.

## Town Square

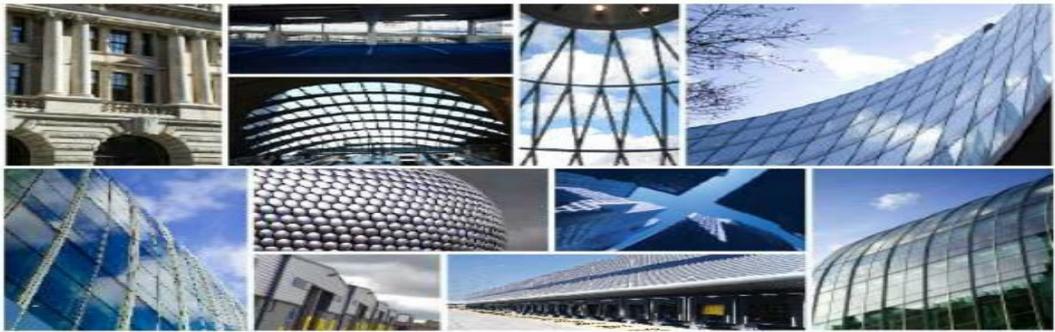


- 6.75 Town Square is not currently allocated as a priority site in the draft TCAAP, however we recommend it is considered for inclusion as an alternative to Victoria Square which is not deliverable or viable as an option. Town Square provides the only opportunity in delivery terms to extend the prime retail area in the town centre and meet potential demand. We appreciate the sensitivity, given its open space in the centre of the town, however we consider that a scheme could retain the Italian Gardens and there is a significant amount of open space nearby at Beach Lawns and Pier square. The site is owned by the Council and extends to 0.56 hectares excluding the Italian Gardens.
- 6.76 The site is situated north of the Sovereign Shopping Centre separated by Post Office Road and bounded by the shopping streets of South Parade and High Street to the north and east respectively. The Winter Gardens conference centre is situated to the west of the property
- 6.77 This prime position within the centre of the town would enable the Sovereign Shopping Centre to expand to attract retailers who are not presently represented in the town or wish to relocate to a more central position. We are aware of requirements from occupiers that we consider could be met at this location.
- 6.78 Our assessment of viability identifies that with an improved property market a redevelopment of Town Square would be viable and we consider this site is ideally placed to meet the requirements of retail occupiers and improve the town's offering. We have assumed a purely retail scheme for this site as it does not have sufficient capacity to meet the retail needs of the town as well as provide a mix of uses.

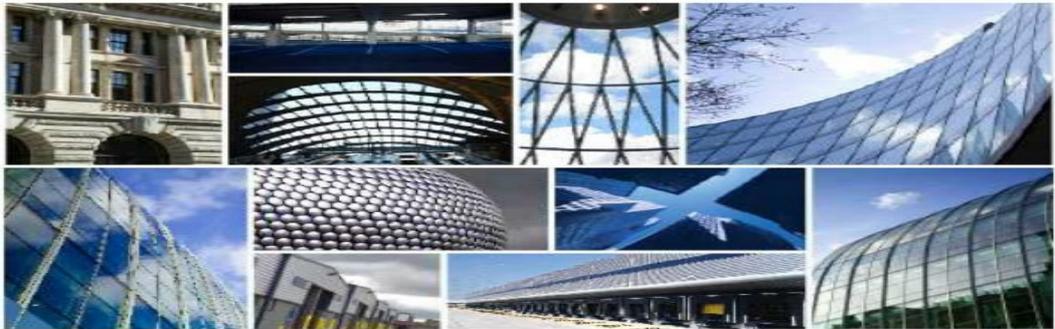
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- 6.79 We understand the adjacent Royal Hotel has a covenant over Town Square with a clause relating to permitted development. This will require further investigation, but we understand is likely to require 50% of development value to be passed to the hotel. This should not affect viability provided the extent of development is not restricted.

#### Recommendation

- 6.80 We recommend that consideration is given to including Town Square as a priority site in order to accommodate retail growth in the town centre and as an extension of the High Street. This allocation would replace Victoria Square which does not represent a viable or deliverable location.



## APPENDIX I LETTER OF INSTRUCTION



## APPENDIX II FLOORSPACE USE PROPOSALS