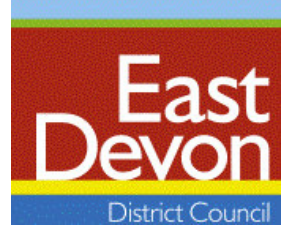


Proposals for the Regeneration of Exmouth



including re-development of the estuary-side area for a Retail Supermarket and Mixed Use Development



CONSULTATION DOCUMENT



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This Consultation

- This document forms the basis of public consultation by East Devon District Council on proposals for the regeneration of parts of Exmouth, as laid out in this document.
- The document examines the needs of retailing in Exmouth; the scope for development in the town; how a 'retail led' development could underpin a significant investment in community and recreational facilities that would constitute a major programme of investment in the town. It also demonstrates in a practical way how the linkage between the Town Centre, Estuary and seafront can be built upon for both the benefit of residents and visitors to the Town.
- The District Council would welcome comments on the following key issues:
 - The promotion of the Estuary as the site for a food supermarket
 - The promotion of London Inn as a comparison shopping [clothes, shoes etc] development opportunity
 - The preferred location for a new leisure centre/swimming pool
 - The mix of uses for the Estuary site
 - The priority to be attached to an interpretation centre for the Exe wildlife and World Heritage Coast
 - The improvement of facilities at Mamhead Slipway
 - The development of the Elizabeth Hall site for commercial purposes
 - The development of the Maer Car Park for residential purposes as a means to help fund the proposed Waterside Centre
 - Opportunities for narrowing/pedestrianising sections of Queens Drive
- The consultation is taking place for 6 weeks from October 18 to November 29, 2004.
- A public exhibition on the proposals will be held in Exmouth town centre in November. Details will be publicised in the local press and on the EDDC website.
- East Devon District Council's Executive Board will consider the responses early in 2005.

YOUR COMMENTS

- Please note that these are proposals only and that if you can suggest alternatives to what is suggested here that would also be welcomed.
- Your comments are particularly requested on the '**KEY QUESTIONS**' identified after each section.
- A Response Form is provided - Appendix M - for you to send in your comments. This Form is also available to download as a 'pdf' or 'Word' document on the EDDC website:
www.eastdevon.gov.uk
- The contact information is on the Response Form.
- **All responses must be received by EDDC by 5pm on Monday 29th November.**

**If you need a copy of this information in large print,
Braille or other format please ask us.**

Executive Summary

- i. A great deal of work has already been done by Exmouth Town Council, Devon County Council and East Devon District Council to set out a vision for Exmouth and tangible improvements have been made. This report builds on many of the ideas and initiatives promoted by these organisations and local opinion formers.
- ii. The emerging East Devon Local Plan provides the planning policy context for the regeneration of the Exmouth Town Centre and Waterfront area.
- iii. In recent years there have been on-going discussions with major food-store operators about developing a large new supermarket in Exmouth. In accordance with national planning policy guidance EDDC staff have informed potential developers that proposals for retailing would need to be supported by retail assessments and address the “sequential test” for site selection¹. For the purpose of the sequential test two major sites were identified for assessment they are: London Inn (including the Gas Holder site) identified at LEX7 in the emerging Local Plan; and Imperial Road Car Park and the Estuary area identified at LEX5 and LEX6 of the emerging Local Plan. [See Appendices A, B & D].
- iv. This report presents the conclusions of the retail reports submitted to date and recommends a way forward in progressing discussions with potential developers.
- v. The issues raised by the proposals for the redevelopment of the estuary area inevitably have implications that go beyond the development site.
- vi. The District Council is proposing that the redevelopment of the Estuary area be used as the catalyst for the regeneration of the Town Centre and Exmouth waterfront. This document sets out a way forward that would achieve this aim by:-
 - Strengthening the town centre, pulling expenditure back to the town centre, enhancing consumer choice and quality of the shopping offered;
 - Improving the gateway entrance to the town centre;
 - Increase spending power within the town by providing residential units on brownfield locations;
 - Increasing the vitality of the town centre and estuary by providing mixed use development;
 - Securing private sector funding to regenerate the waterfront area;
 - Strengthen the commercial content along the promenade, providing visitors and residents with greater choice for eating and drinking;
 - Delivering quality leisure facilities;
 - Improving facilities for boat users; and
 - Increasing the employment base of the town.
- vii. These proposals are presented as a package; and as a deliberate strategy of using public assets to lever in private sector funding to invest in the town.
- viii. It also sets out a number of significant initiatives to deliver local aspirations should there be a strong wish from stakeholders that this be desirable. Specifically, a waterside centre for Exmouth and interpretation facility for the estuary wildlife and world heritage coast. Both projects would require heavy cross subsidy from development to deliver. Capital receipts would be required in addition to other funding opportunities.
- ix. Prior to making key decisions East Devon District Council will have to carry out a project appraisal to ensure that community aspirations are both realistic and deliverable.

¹ The sequential test means that central urban sites must be investigated first, followed by urban-edge sites and finally rural sites.

KEY ACTIONS BEING UNDERTAKEN BY EAST DEVON DISTRICT COUNCIL IN RELATION TO THESE PROPOSALS

1. The public and all key stakeholders will be consulted on the proposals
2. The Imperial and Estuary Car Park sites, identified by the emerging Local Plan Policy LEX6, will be promoted to potential developers as a mixed used development site, including a major food supermarket of 3,716sqm (40,000sqft) retail sales.
3. A design working group will be set up to prepare a planning brief for the Estuary Site, with a visual presentation of a preferred option to form the basis of a project appraisal. The working group will involve key stakeholders including representatives of Exmouth Town Council, the Town Centre management group and Devon County Council.
4. The District Council will work with key stakeholders to identify the nature of the community facilities to be delivered as part of this proposal, in particular to examine the proposal for a World Heritage Coast and Estuary Interpretation and Wildlife Centre.
5. The current position of the sports centre will be investigated as the preferred location for the supermarket and the public and key stakeholders will be consulted on possible alternative locations for a new leisure centre/swimming pool.
6. The Post Office and London Inn Car Park site identified by Local Proposal LEX7 is recognised by EDDC as the preferred location for comparison shopping and car parking.

N.B. It is important for the District Council to continue to work to take these proposals forward because of the lengthy processes involved. However this does NOT mean that any decisions have already been made. This consultation WILL influence what happens.

Background

- 1.1 To quote from the University of Exeter's report 'A social and economic assessment of Exmouth 2000': " Retailing is a major aspect of commercial life in Exmouth and is considered to have a key economic function in the town. As well as providing facilities and employment to the local resident population, it can encourage tourists and day-trippers to visit the town. Furthermore, the general ambience of the town centre can be important for attracting new businesses to the area, as quality of life becomes an increasingly important determinant of business location.

"Exmouth is already centre of social and economic activity for both residents and visitors but it also has real potential for development. The town has a very attractive natural location and also a significant amount of infrastructure that could be more fully utilised with some creativity, planning and investment.

"Improvements to the town centre and to the Esplanade are likely to increase its attraction as would improvements to both shopping, recreational and leisure facilities. In addition, further attention to Exmouth's natural resources which offer a potential key attraction of the town is required. The planned heritage coast initiative represents one way in which to capitalise on these natural resources and begin to build an identity for the town.

"Exmouth has suffered a steady decline for many years and needs investment and vision to first stop and then reverse this trend." (University of Exeter, 2000).
- 1.2 Exmouth town centre is a vibrant and attractive retail centre which supports a diversified range of units. The level of vacant units is low and the centre has improved its position in the ranking of town centres in the period 1998 to 2001 by 4%. However, there is a common perception among most of the Exmouth's various stakeholders that the town centre is not as prosperous and vibrant as it once was.
- 1.3 The University of Exeter's study of Exmouth concluded this decline has to be viewed within the context of a significant growth in the population of the town over the last twenty years. During that time, although floor-space in shop-type premises has increased, there has been a fall in the amount of floor-space devoted to selling goods. The decline in goods space is related to convenience goods (food, drink, cleaning products) retailing whilst the space devoted to comparison goods (clothes, shoes etc) has slightly increased. Furthermore, Exmouth residents and parts of the business community also see the increasing number of charity shops as an indicator of reduced economic vitality.
- 1.4 The most significant change in retailing in the town centre has been the continual decline in convenience goods floor-space, which has fallen by 45% over the twenty years. Retail consultants have confirmed that a significant amount of convenience goods expenditure is flowing out of the town centre to Tesco's at Salterton road and Exeter. Within small town food stores are often the lifeblood of the centres, acting as the principal draw for shoppers which encourage linked shopping trips. The University's study found that 62% of residents choose to shop at out-of-town supermarkets which suggests the current offer in the town is not sufficient – either in the type of retail store on offer, or the ease of access to it. It is therefore vital to provide a new food-store to stem the leakage of convenience expenditure out of the town.
- 1.5 This report examines the needs of retailing in Exmouth, the scope for development in the town, and how a retail led development could underpin a significant investment in community and recreational facilities that would constitute a major programme of investment in the town. It also demonstrates in a practical way how the linkage between the Town Centre, Estuary and seafront can be built upon for both the benefit of residents and visitors to the Town.

Policy Context

2.1 The East Devon Local Plan 1995 to 2011 (Revised Deposit – September 2003) provides, along with the Devon Structure Plan, the policy context for development within Exmouth.

Copies of the East Devon Local Plan are available at Exmouth Town Hall, Exmouth Library, and on line at www.eastdevon.gov.uk

2.2 The following objectives are endorsed in the emerging Local Plan:-

1. Provide for the shopping needs of all sectors of the community.
2. Sustain and enhance the vitality (liveliness and vibrancy) and viability (commercial well being) of the town centres.
3. Resist development that would draw business away from town centres and encourage car use; and
4. Focus mixed use including shopping, employment, housing and leisure activities in town centres.

2.3 Exmouth represents the largest centre in the district and is identified as a larger Area Centre. Paragraph 7.5 of the Local Plan states that the Council will encourage proposals which:

1. Attract investment providing high quality new buildings;
2. Encourage investment in retail employment and leisure uses;
3. Encourage mixed use development;
4. Encourage an increase in housing in the town centre;
5. Provide for effective use of upper floors, and can be served by a variety of means of transport.

2.4 Policy SH3 accepts that large food-stores will be permitted within the established town centre shopping areas of Area Centres and accepts that edge of centre sites will be considered where no town centre sites are suitable or viable for the proposed use. Development of such uses must satisfy a number of criteria including accordance with the allocation of the site (unless alternative provision can be secured elsewhere within the Area Centre), accessibility by a choice of means of transport, evidence of no adverse impact on the vitality and viability of protected centre and no detrimental impact on local residents.

2.5 The Exmouth chapter of the emerging Local Plan identifies a number of sites considered to possess the potential for growth of the town centre for retail and commercial development (paragraph 13.35). Paragraph 13.47 states that the Imperial car park, bus station, British Rail club and Estuary car park have long been identified by the local authority to offer the potential for redevelopment, focused on the possible retail and community uses. The Plan accepts that any scheme could offer significant improvements for linked trips to the town centre. Policy LEX6 confirms the allocation of the site as appropriate for comprehensive redevelopment, subject to a number of criteria including improvements to public transport facilities, improved linkages with the town centre and visual improvements on entering the town.

2.6 Proposal LEX7 allocates for mixed-use development focused on retail/commercial uses and car parking at London Inn car park, post office, Builders Yard, Fore Street, vacant Gas Depot site and former gas holder site at Union Street.

See Appendix A for the relevant text from the East Devon Local Plan.

2.7 Paragraph 13.43 recognises the recreational opportunities offered by the waterfront and the District Council will encourage proposals to promote the waterfront. Facilities for recreational and professional boating shall be retained and improved. Proposal LEX5 (Exmouth Waterfront) states the waterfront will be enhanced by the redevelopment of the former outdoor pool site and the development of recreational opportunities. The proposed Waterside Centre is noted.

- 2.8 Paragraph 13.37 of the emerging Local Plan encourages supporting facilities for tourism and states opportunities from the designation of Exmouth as a gateway town to the World Heritage Site including the provision of an Interpretation Centre will be pursued.
- 2.9 The emerging Local Plan provides an up to date and comprehensive policy framework to consider these regeneration and property issues.

The need for Retail Development in Exmouth: the evidence

- 3.1 The first test of national planning guidance (PPG6) in respect of retail development is whether a need exists for new floor space. Consultants RPS Group Ltd (RPS) on behalf of Asda have submitted a retail assessment and town centre study, this has analysed the need for development and assessed the likely impact associated with a new food-store development in the town. Asda has an option agreement on part of the Estuary site. For analysis purposes a food-store of 3,716m² net (40,000ft²) with adjacent car parking is proposed. Chesterton Planning and Development (CPD) were appointed by the Council to review the findings of the study and assess the robustness of the study.
- 3.2 The main findings of the retail assessment are as follows:
- Exmouth Town Centre comprises 273 units of 37,700m² (352,000ft²) of gross floor space.
 - 60.4% of units provide for comparison (clothes, shoes etc) and convenience (food and drink type items) uses. Convenience provision in Exmouth is over 20% lower than the national average and some 10% above national average in comparison provision.
 - In terms of floor space convenience floor space in the town centre is 50% below national average. This is identified by RPS as a good indicator of qualitative needs.
 - Comparison floor space provision exceeds the actual average.
 - Vacancy rate in the town centre is low (4.55%) approximately half the national average.
 - Exmouth's Town Centre retail strength has improved and is ranked 405 in the Country.
 - 74 units in the town centre are operated by national multiples. This equates to 27.11% of the town centre provision lower than the national average of 34% but probably reflects proximity to Exeter.
 - Total convenience goods expenditure generated by residents in the catchment area (Exmouth and Budleigh Salterton) amounted to £54.11 million at 1996 prices. This is expected to rise to £55.3 million in 2006 and £56.74 million in 2011. The shopping survey undertaken by NEMS Market Research in May 2003 suggests that the majority of the expenditure is spent within the study area.
 - Comparison goods expenditure was £82.36m in 2002 rising to £97.7m in 2006 and £120.77m in 2011. Not all of this expenditure will be available to study area stores as a significant percentage will be spent in Exeter City Centre and other locations. 60% is estimate to be retained by shops within the study area equating to £59.6m in 2006; which will rise by £2.8m p.a. thereafter.
 - The level of expenditure generated by visitors in the study area is about £16.3million, of which about £4million p.a. is spent on convenience goods.
 - Tesco at Salterton Road, Exmouth is estimated to have a turnover of £37.06m.
 - Sommerfield within Exmouth Town Centre is estimated to achieve a turnover of £38.82m.
 - Other stores within Exmouth Town Centre achieve a total turnover of £4.73 million.
 - Budleigh Salterton Town Centre food stores are estimated to turnover £1,8m and other stores in the catchment £3.53m.
 - A total of £8.38m of convenience goods expenditure is estimated to flow outside of the study area, mostly to Exeter (£6.27m).
 - RPS estimate there is significant levels of over-trading with the catchment area. The Sommerfield store is estimated to be trading at 95% above company average; with the Tesco store on Salterton Road estimated to trade at 52.8% above company average.

3.3 The existence of significant levels of outflow and over-trading within the catchment area is a clear indication of quantitative need:

- If we compare the level of available expenditure in the catchment area with the benchmark turnover levels of existing provision this shows that in 2002 there was a surplus of available convenience goods expenditure of about £24.06 million, rising to £25.25 million by 2006. The figure for comparison goods is £40.12 million in 2002 rising to £55.45 million by 2006. If one assumes a comparison goods trade retention of 60% in the study area, the surplus capacity for comparison goods is £24.47 million in 2002 and £33.82 million in 2006.
- The proposed Asda store would generate a turnover of £33.44 million of which £27.42 million would be convenience goods and £6.02 million would be comparison goods. Of this total 85% or £28.42 expenditure could be expected from the study area.
- This level of expenditure could be supported by expenditure available in the study area. At 2006 there would remain a surplus capacity of about £1.94 million in available convenience goods expenditure and £28.15 million surplus in comparison good expenditure.
- Therefore, a new 40,000sqft food-store will meet much of the identified need for convenience floor space over the local plan period to 2011 but will still leave a cushion of a valuable expenditure to support other stores.
- In terms of comparison expenditure, even allowing for structural outflow of 40% the remaining capacity of £28.15 million in 2006 and £42.07m in 2011 could support up to 11,000sqm and 16,000sqm of additional comparison floor space in the study area for 2006 and 2011 respectively.

Trade Draw from existing shops

4.1 RPS estimate that the greatest level of turnover will be drawn from the existing Tesco store. RPS estimate an impact of 39.45 (£14.62m) on convenience expenditure and 38.9% (£2.17m) on comparison goods expenditure.

- Somerfield would also be affected with a 35.025 diversion of turnover on convenience goods (£3.09m) and 32.4% diversion of turnover on comparison goods (£.21m)
- RPS estimate the impact on Exmouth Town Centre will be low (excluding Somerfield) Exmouth Town Centre was a total turnover (2006) of £57.20, they estimate a £1.44m diversion of trade equating to 2.5%.

4.2 The Council employed Chesterton Consultants to consider the assessment made by RPS. Chesterton accepts the argument that there is a need for an improved choice and range of goods within the Town and that the existing superstore goods offer is limited. Chesterton accept that at a fundamental level there is a need to strengthen the retail offer in the town in order to prevent leakage to other centres, including Exeter.

KEY QUESTION:

- **Do you agree that provision should be made for a new supermarket in the centre of Exmouth ?**

Sequential Approach: London Inn Site - [See Appendices B & C]

5.1 Developers have been informed that London Inn Car Park, Post Office and Service Yard, (0.9ha, 2.25 acres) and the former Gas Depot and Gas Holder sites and builders yard (0.8ha, 2.1 acres) constitutes a single development site identified in the emerging Local Plan that should be considered for the purpose of the sequential test. This site is located closer to the Town Centre shopping area.

- 5.2 Donaldsons, acting on behalf of the Developer, has carried out an analysis of the retail sites. It provides an overview of the development options for the London Inn and Imperial Car Park sites and the likely commercial implications of each.
- 5.3 The development of the London Inn site has been assessed against two options:
1. A 3,720m² (40,000ft²) store with 350 car parking spaces.
 2. A 1,850m² (20,000ft²) store with 250 car parking spaces. This would be a single store format.
- 5.4 The 40,000ft² option covers an area of 2.91ha (7.2acres) and would include or affect prime retail units on Chapel Street and Albion Street, along with residential housing in Albion Court, Lower Fore Street, Victoria Place, Helena Place, Albion Street and Union Street. The land taken and associated costs would be so extensive as to eradicate any possibility of a viable development. There would also be significant disadvantages to the town centre, in that a large number of retail units would be lost to enable a scheme of the size to be accommodated.
- 5.5 Some 50 properties would have to be acquired, this would also require compensating many of the firms for disturbance. Donaldsons have provided detailed figures with all the valuation assumptions in their report. The total estimated cost of land acquisition is in the order of £24million plus £22million in compensation for disturbance, giving an overall cost for acquisition of £46million. Added to this are costs associated with highways, ground conditions etc estimated to bring the total cost to £49million. Even accepting some leeway in the costs the total cost is still in the order of £50million.
- 5.6 Donaldsons conclude that a 40,000ft² single user retail store on London Inn would not be viable and do not envisage a capital value for the completed scheme being achievable at a level which would begin to meet these acquisition costs.
- 5.7 The 20,000ft² retail store on the London Inn site would require the London Inn Car Park, Post Office and Service Yard, the former Gas Depot and Gas Holder sites and Jewsons Buildings Yard and retail unit.
- 5.8 The cost of acquiring the land for the 20,000ft² option would be in the order of £8million. This is a more realistic and acceptable overall acquisition and servicing cost. The level of costs in this scenario are more likely to produce a viable scheme, but only on the proviso that a 20,000ft² store produces an adequate level of turnover and return in comparison to the larger format store to generate sufficient land and property values. To this end Donaldsons conclude they do not consider that operators would be prepared to take a store of this size in light of alternative provision within the catchment area i.e. the Tesco store on Salterton Road. Donaldsons believe 20,000ft² store is not of sufficient critical mass to allow effective competition against the Tesco store.
- 5.9 Drivers Jonas acting on behalf of the District Council has looked at the redevelopment potential of the London Inn car park and has prepared an appraisal of scheme of 42,000ft² gross (25,000sqft net) incorporating a post office counter and 264 space shoppers car park. The form of the scheme recognises that a stand alone store would be an inward looking one and would not integrate particularly well with Chapel Street and the Magnolia Centre and therefore necessitate the inclusion of existing retail units on Chapel Street (.4 units and the post office). Drivers Jonas conclude that such a scheme, which in physical terms would work, would not be commercially viable.
- 5.10 In conclusion in terms of accommodating a viable food store on the London Inn site, the reports that have been prepared by Donaldsons and Drivers Jonas confirm that both a 40,000ft² food store and 20,000ft² food store are unviable.

The Imperial Road/Estuary Site Car Park - [See Appendix D]

- 6.1 The Estuary site comprises a single, distinct, triangular area of land located approximately 100m from the town centre and running along the bank of the estuary, which is situated along the northern boundary along with The Royal Avenue. The site is bordered to the east by Imperial Way, linking the site to the town centre, and to the south by Marine Way. In total, the development covers a site area of c.3.5 hectares (c.8.75 acres) and incorporates a range of uses including the Imperial Road Car Park, British Rail Club, Bus and Rail Stations, Sports Hall and Swimming Pool, Estuary Car Park and Lorry Park. The site has vehicular access from Imperial Way, with pedestrian linkages to the town centre and Chapel Street from a number of points.
- 6.2 Development of the Estuary site will require agreement with a limited number of landowners comprising East Devon District Council, Devon County Council, South West Water and the South Western Electricity Board, the latter two parties holding minor operational interests. In addition, the acquisition of three leasehold interests will also need to be negotiated, as will as possible covenant negotiations.
- 6.3 Donaldsons have not outlined individual values for reasons of commercial confidentiality or agreed prices across the various interests. However, Donaldsons consider this to be a viable proposition that is capable of delivering a 40,000sqft single user retail store. The site has the potential to deliver much more than the single store. The established commercial interest in the site clearly establishes this to be a viable option.
- 6.4 Donaldsons conclude that Imperial Car Park/Estuary site is the only feasible and deliverable option for the development of a commercially viable quality food store in Exmouth town centre. London Inn is more suited to comparison shopping.
- 6.5 This conclusion is shared by the Council's consultants and therefore in policy terms, having established the need for a food-store that is capable of being supported by available expenditure and, having satisfactorily addressed the sequential test ruling out a closer town centre site, in principle the Imperial Car Park/Estuary should be considered appropriate for a retail food store.
- 6.6 There are a number of concerns associated with the development of the Imperial Car Park site from the point of view of the impact on the Town Centre.
- 6.7 At present Imperial Road/Marine Way creates a barrier to pedestrian movement and if this is not addressed it will reduce the potential for linked trips with the town centre. If development were to take place in the area between the bus station and the estuary car park the distance that pedestrians would be expected to walk between the supermarket car park and the town centre would exceed the acceptable distance identified in PPG6 of 200-300 metres. The combination of the physical barrier of the road and the distance to walk presents the possibility that visitors to a store in this location may effectively by-pass the town centre altogether. The location of the store within the site and in relation to the town centre and treatment of the highway and car park would therefore be crucial issues to address.
- 6.8 This would suggest that the ideal location for a food supermarket would be in the approximate location of the sports centre where the main pedestrian access to the shops could be positioned as close as possible to the current roundabout on Imperial Road. Thereby minimising the distance to the Town Centre and narrowing the highway to a minimum, ideally providing an at grade pedestrian crossing. This would allow the current Imperial Car Park to be enlarged and strengthening the current pedestrian links to the Town Centre. Such a layout would strengthen the link to the town centre and deliver a genuine opportunity for linked shopping trips.
- 6.9 If the Imperial Road site is promoted for a food store consideration will need to be given to whether or not the Council should restrict any planning permission to control the level and extent of comparison (non-food) shopping. If the store is located and designed such that it genuinely functions as part of an enlarged town centre then concerns about comparison

shopping are diminished. If the store is located on the estuary car park, then concerns regarding poor opportunity for linked trips would suggest that a restriction would be required.

Linked trips to the Town Centre

- 7.1 Survey work undertaken by J Sainsbury indicates that some 24.2% of all trips to edge of centre food stores link with trips to the town centre itself, and 73% of these involve additional shopping. RPS have calculated that assuming an average food-store spend £25 per head, it can be expected that a food store such as that proposed would over a period of a year attract 1.33 million shoppers. At the relatively low level of linked trips identified by J Sainsbury, this would suggest that 17.6% or 235,000 customers would visit the town centre to undertake other shopping. At an average spend of £10 per head, this would equate to a "spin off" benefit for other town centre shops of approximately £2.35 million per annum. The net result for the town centre therefore, based on these conservative estimates would exceed any trade diversion from existing town centre shops.
- 7.2 However, by providing excellent pedestrian links between the Marine Way site and the town centre together with its location adjacent to the principal town centre car park and existing public transport nodes should mean that the rate of linked spending trips could be higher than this. If 25% of all trips resulted in town centre spending, the level of "spin-off" benefit for existing shops would be in the order of £3.3 million per annum.
- 7.3 RPS state the total turnover of Exmouth town centre without Asda would be £66.67 million in 2006. With Asda the turnover would increase to £95.1 million; an increase of over £28 million. If an additional £3.3 million of spin-off trade was generated the total turnover would increase to £98.4 million. This represents an increase of over £31 million in the turnover of the centre, equating to an increase of over 47% compared with the centre without the Asda development.
- 7.4 If the Imperial car park site is promoted as a food supermarket the precise mix of uses that should be developed along side a food store use require careful consideration. Although it is uncertain whether there would be interest from retailers if additional retail uses were developed, a more comfortable mix of uses would include restaurant uses. Given the position of the site in relation to the estuary an opportunity exists for the Council to promote land uses on this site that will improve the attraction and draw of the town.
- 7.5 The Council should consider the development of the Imperial car park site for a major convenience store led development as being fundamental to a wider retail strategy for the Town Centre.

Mix and form of Development

- 8.1 The emerging Local Plan Policy LEX6 sets out a number of requirements:
1. Provision of community facilities to serve the Town as a whole.
 2. Improve public transport interchange facilities including additional platform at the railway station.
 3. Maintain or increase car parking
 4. Provide footpath and cycleway along the waterfront and improved links to the Town Centre.
 5. Relocate the coach and lorry park.
 6. High standards or design of buildings, landscaping and spaces.
- 8.2 A planning brief or master plan will be required to address these requirements and to engage stakeholders in the content and form of development. This is truly a unique site within the town representing a gateway to the Town and Town Centre and capable of delivering a landmark development. Its relationship to the waterside provides both an opportunity and design challenge.

- 8.3 In sustainability terms the location alongside the public transport interchange at the edge of the Town Centre suggests that land uses and densities should maximise the locational advantages of this site.
- 8.4 A single retail superstore will not deliver the optimum form of development reflecting these requirements. A mixed-use development is demanded.
- 8.5 In addition to retail development, food and drink operators are also vital to attract people into the town centre as they provide focal points where shoppers can meet and rest. At present none of the national coffee-houses trade in Exmouth and the Town lacks a number of popular national restaurants chains.
- 8.6 Residential development, particularly apartments above a commercial development would optimise the potential of the site. Residential values are often the key to cross funding new mixed-use development. One can anticipate that new built apartments with sea views would command a great deal of interest from residential developers. Residential development can provide mass and form to lift the quality of this development as an impressive entrance to the site and provide value to deliver a first class community development.
- 8.7 Other uses that could be attracted to this site include hotel and leisure development. Currently there is no known demand for a hotel or health and fitness club in the Town but in principle such uses could be acceptable as part of a mixed use development. Often office accommodation would be considered as part of a mixed use development in such a location, however this is unlikely to be viable and could require cross funding with other uses. There is unlikely to be demand for offices.
- 8.8 It has long been recognised that development of the estuary area should make a contribution to community infrastructure. Community uses would require cross subsidy with receipts or may even require an additional capital sum and possibly on-going revenue subsidy. Therefore the greater the amount of viable commercial and residential development that can be accommodated on the site the greater the potential for delivering community uses.
- 8.9 The Council would need to affirm what community benefit it would be seeking to deliver through the development of the site. So far suggestions have included a Library and a Wildlife and World Heritage Coast Interpretation Centre. The W.H.C. Interpretation centre has identified this site as having potential to deliver an Interpretation centre and because of its relationship to public transport and the Town Centre its potential at the start of the WHC must be significant. The presence of an internationally important wildlife area adjacent to the site suggests a multi-functional Interpretation Centre could have a broad appeal. There is considerable interest building in the town for such a facility and further work would be required to determine the business development opportunities of set a venture.
- 8.10 It is clear that whatever community facility is to be provided there will be an element of cross subsidy. Therefore, the Council would need to be sure that the community facility has a broad range of support, can be maintained without on-going revenue subsidy and can be delivered without compromising the overall viability of the development. To take this forward it is suggested that the Corporate Director – Environment work with the key stakeholders to define precisely the community use(s) the Council would be expected to provide and what, if any, funding would be available to assist.

KEY QUESTIONS:

- **Should the Estuary site be left as it is ?**
- **What is your preferred choice of uses for the Estuary site ?**
- **What is your preference for community benefits: Library or World Heritage coast & Exe Estuary Wildlife Centre or something else ? Please state.**

The Sports Centre [See Appendix D]

- 9.1 The Sports Centre occupies the location which provides the best opportunity for the food supermarket to relate to the town centre. Indeed it is difficult to conceive how a satisfactory development could be delivered without acquiring the current sports centre. The cost of acquiring and replacing the sports centre would be substantial – approximately £5 million.
- 9.2 The Council will therefore need to address the question of whether the existing sports centre should be re-provided as part of the scheme or elsewhere within the town. The immediate benefit of replacing the sports centre elsewhere in the town is that it frees up this valuable site to generate income to cross subsidise the comprehensive development including community facility. It also means there is potential to have a positive impact in other parts of Exmouth, such as the seafront area, which should benefit from such a development.

KEY QUESTIONS:

- **Should the supermarket be located on the present site of the Sports Centre ?**
- **If yes, should a new sports centre should be built elsewhere as a consequence of developing the Estuary site ?**
- **If yes, where ? Somewhere close to the seafront ? On another part of the Estuary side site ? Elsewhere ? Please state**

London Inn - [See Appendix B & C]

- 10.1 Retail Consultants have identified a total floor-space requirements of some 40,000ft² to 60,000ft² (3,865m² to 5,575m²) for Exmouth Town Centre. This demonstrates considerable occupier demand for a location of its size. This level of demand would provide justification for a new town centre retail scheme to be promoted to compliment the current retail offer. The range of demands from occupiers is for varying unit sizes between 300ft² and 16,000ft².
- 10.2 This demand would allow for a more traditional form of high street scheme to be designed around the constraints of the London Inn site, in particular integrating development into the historic street pattern and scale of existing development. A more traditional shopping development would assist with the land assembly and servicing, issues and therefore make a redevelopment scheme more viable and ultimately deliverable.
- 10.3 The retail accommodation in the Town Centre is characterised by traditional Victorian shop units which do not readily adapt to suit the requirements of modern retails. Modern retailers want to operate from large floor plots and this is not easy to provide. One way of providing this is to amalgamate units to provide larger floor areas, but this can squeeze out of the market local and independent retailers. London Inn site may assist in meeting this consequence. Drivers Jonas recommend that a scheme be promoted for the Post Offices part of the London Inn site.

KEY QUESTIONS:

- **Should the London Inn be retained as a car parking area ?**
- **Or should the London Inn site be promoted as a potential development site for more traditional comparison goods [clothes, shoes etc] ?**
- **Should the District Council try to secure a food supermarket on the London Inn site ?**

Car Parking

- 11.1 The downside of developing the London Inn car park are the implications for car parking. London Inn is the most popular short-term car park. It fills up early and stays close to capacity for much of the day. There are 167 spaces available. Any loss of car parking at London Inn is likely to be keenly resisted.
- 11.2 The gas holder site to the east of Union Street could provide up to 300 spaces as a surfaced car park. Should London Inn be developed it would be essential that the gas holder site be brought forward as a car park.
- 11.3 The draft Exmouth Car Parking study has assessed the demands for car parking in the Town with and without a supermarket.
- 11.4 With no supermarket development a minimum of 10 extra spaces are required between 2003 and 2011. With a new supermarket 250 spaces are required. These are low growth figures.
- 11.5 The promotion of a retail development at London In would need to be considered in the context of the parking review.

KEY QUESTION:

- **Should the District Council pursue a multi-storey car park on the Estuary site ?**

Former Outdoor Pool Site [See Appendix E & F]

- 12.1 The site has the potential for contributing to the leisure related activities of the sea front and has long been recognised as intrinsically related to the success of the area in attracting visitors.
- 12.2 The District Council is currently considering an offer from the operator of a bowling centre to implement a scheme for the redevelopment of the former pool site as a bowling centre with restaurant, café and shops. The scheme was granted full planning permission in October of last year.

See Appendix E for a sketch of the proposed bowling centre
- 12.3 Commercial advisors have been instructed to assess the offer made to the District Council in terms of best price.

Elizabeth Hall [See Appendix G]

- 13.1 Elizabeth Hall occupies a prime location on the seafront at the start of the leisure and recreation area. It is a single storey Victorian pavilion with domed portico set back from the Esplanade. The frontage area is used for private parking and outdoor markets/car boot sales. Public toilets adjoin the space. To the rear of the Hall, Bath Road provides a segregated route between the Esplanade and the town centre via Beacon Hill.
- 13.2 The Elizabeth Hall site has the potential to lift and consolidate the commercial frontage between Imperial Hotel and the former pool site. The main activity that takes place at the site is car boot sales which are held Saturdays and Sundays, and occasionally on Wednesdays. Total income last year from the car boot sales was £6,708. Activities within the building generated a further £5,197. The building is used by Exmouth Art Group and occasional drama class.
- 13.3 In terms of the interests of the Town as a whole currently the site does not contribute to its full potential, the building is too small to be usefully converted. Although pleasantly detailed

the building makes a minor contribution to the townscape. This is an opportunity site on the waterfront that should maximise its potential for visitors to the resort. Is this best achieved by car boot sales ?

- 13.4 The recommended way of going forward on this site is to consult on the proposal to declare Elizabeth Hall surplus to requirements and to market the site with the benefit of a planning brief. Any freehold covenants affecting the site will need to be modified.

KEY QUESTIONS:

- **Should the Council redevelop Elizabeth Hall for commercial purposes ?**
- **If yes, what kind of use would you support eg restaurant or other use [please state] ?**

The Maer Car Park [See Appendix H]

- 14.1 The Maer Car Park is primarily an overspill car park used during the peak season. As a car park it benefits visitors to the town. However its value is limited by reason of its relative remoteness to the waterfront and thus because of the distance it tends to be used in the main only during the peak season. 345 long stay spaces are provided, this generated an income of £8,766 for the last financial year.
- 14.2 Redevelopment of the car park for residential purposes would generate a capital receipt that could be used to deliver a major tourist/visitor facility for the town and provide improved facilities for residents. The emerging Local Plan recognises that the waterfront is a major asset that offers recreational opportunities. The District Council is committed to encouraging and promoting recreational opportunities. The development of the Maer Car Park would provide the funds to deliver a major project.
- 14.3 Members will be aware that the Exmouth Waterside Group had promoted the building of a waterside centre at Foxholes Car Park Queens Drive to provide a centre for water based activities in Exmouth. Although there has been some concern expressed about the choice of location, the Project received wide spread support in the town and from the District Council. However, the project was very heavily reliant on public sector support and the Council was unable to support the project.
- 14.4 The development of the Maer Car Park would allow the Council to generate a capital receipt to help fund the cost of the Waterside Centre and deliver a first class, regionally important facility. The business plan submitted by the waterside Group estimate the cost of the centre as £1.5 million of which the Council were asked to contribute the larger part of the cost plus gifting of the land for the building. There has always been the intention of applying for funding from the Sport Lottery. The loss of income from car parking is always a concern to the Council, as is the loss of parking, but the benefits in this scheme could be considerable. Should there be in principle support for the development of Maer car park the Council can prepare a detailed financial appraisal.
- 14.5 The benefits to the Town are those that have always been advanced by those who have supported the project:
- Provide a much needed facility for the range of clubs with poor or non-existent facilities.
 - Development of Exmouth as an area offering excellent waterfront facilities for enthusiasts.
 - Provide a focus for watersports activity.
 - Improve the image of Exmouth and raise its profile as a destination for watersports.
- 14.6 The Maer car Park would make an attractive residential site and because of the levels across the site some public car parking could be provided if required in a basement.

- 14.7 The recommended way forward would be to consult on the proposal to market the site on the open market with the benefit of a planning brief.
- 14.8 There are a number of issues relating to the proposed waterside centre that would need to be addressed should the in-principle support be forthcoming, not least the need to obtain planning permission and detailed site specific matters.

KEY QUESTIONS:

- **Should the Maer Car Park be retained as a car park ?**
- **Should the Maer Car Park be redeveloped for housing, with funds raised directed to a new Waterside Centre ?**
- **Should public car parking be retained as part of a redevelopment of the Maer Car Park ?**

Improvement to Mamhead Slipway [See Appendix J]

- 15.1 Mamhead slipway is the most popular slipway for launching boats but the current arrangements are less than satisfactory with cars and trailers experiencing difficulty in waiting to launch. The highway at Mamhead is subject to parking restrictions but inevitably vehicles park on the street waiting to use the slipway. There is also the difficulty experienced by coaches associated with Stuart Line Cruises being able to board or alight passengers. The area currently used by coaches will not be available in the long term. A significant number of visitors to the town are attracted by the Stuart Line Cruisers and improving these facilities are pressing.
- 15.2 It is proposed that part of any capital receipt from marketing the Council's assets be dedicated to improvements to Mamhead Slipway. The area adjoining the slipway currently laid out as a grassed amenity area is the obvious location to provide an area for trailers and vehicles wishing to launch from the slipway. Planning permission would be required for any change to this area and it is recommended that as part of the strategy this be taken forward.

KEY QUESTIONS:

- **Do you agree that the grassed area adjacent to Mamhead Slipway should be set aside for improvements to the slipway ?**
- **Can you suggest other ways to improve Mamhead Slipway and its use ?**

Queens Drive [See Appendix K]

- 16.1 The Exmouth Waterfront study promoted the idea of narrowing the section of Queens Drive in front of the car park. This is an area that would appear to have the potential to pedestrianise a section of the road. The existing vehicles access to Queens Drive Car Park could be revised to provide a realigned Queens Drive, so that the main road would be taken to the rear of the car park and emerge between the existing beach huts. This would provide an opportunity to incorporate the existing highway into the footprint of a new building which would have pedestrian access straight onto the beach.
- 16.2 It is recommended that this be investigated to establish the potential of this area to support additional recreational and visitor facilities, including the scope for the possible relocation of the leisure centre.

Key questions on next page

KEY QUESTIONS:

- **Should the Council explore redevelopment opportunities in the area of Queen's Drive Car Park ?**
- **Should the Council pursue a scheme for pedestrianising a section of Queen's Drive ?**

References

- East Devon Local Plan 1995 to 2011 (Revised Deposit – September 2003)
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- Exmouth – Analysis of Retail Sites, Donaldsons, September 2004,
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