FAREHAM
BOROUGH COUNCIL

Fareham Borough Retail Health Check

Summary Paper 2017

Contents

Introduction

This summary paper provides an annual update on the retail health of the Borough's main shopping centres, which are defined as:

- Fareham Town Centre
- Portchester District Centre
- Locks Heath District Centre
- Stubbington Local Centre
- Park Gate Local Centre

The Retail Health Check (RHC) assesses these core retail Centres to provide information on: ground floor unit occupancy; performance against adopted Local Plan (LP1 and LP2) policies relating to retail development; and footfall (Fareham Town Centre only). The first RHC was undertaken by the Council in 2009. This paper provides comparative analyses of the Centres against previous annual assessments in order to illustrate particular changes and trends.

The data collected from monitoring the Borough's core Centres in the RHC helps inform the development of the Draft Fareham Local Plan 2036. It is also used to inform development management decisions on planning applications within the core centres and approaches to Centre management. However, it is important to note that the RHC is not intended to be viewed as a retail study.

National Planning Policy Context

National Planning Practice Guidance (PPG) sets out Key Performance Indicators (KPIs) which can be used to monitor the 'health' of town centres. Table 1 sets out how these KPIs are captured as part of the Retail Health Check and other evidence studies.

KPI	Definition/Function	Timescale	Method of Data Collection
Diversity of uses	The amount of space in use for different uses such as offices; shopping; leisure, cafes and hotels.	Annually (September) expect for Fareham TC (6 monthly)	Review of units in town centre by observation. GIS used to calculate total floorspace.
Proportion of vacant street level property	The ratio of vacant ground floor units to the total number of issues.	Annually (Summer) except for Fareham TC (6 monthly)	Review by observation
Commercial yields on non-domestic property	Demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments.	Long-term	New/updated Local Plan evidence studies.
Customers' views and behaviour	Regular surveys to help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities.	Long-term	New/updated Local Plan evidence studies.
Retailer representation and intentions to change representation	Existence and changes in representation of retailer, including street markets, and the demand of retailers wanting to come into the centre.	Long-term	New/updated Local Plan evidence studies.
Commercial rents	Demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments.	Long-term	New/updated Local Plan evidence studies.
Pedestrian flows	A key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets.	6 monthly for Fareham Town Centre	Footfall counts at set locations.
Accessibility	Ease and convenience of access by a variety of travel options, including – the quality, quantity and type of car parking; the frequency and quality of public transport, the quality of provision for pedestrians, cyclists and disabled people.	Long-term	New/updated Local Plan evidence studies.
Perception of safety and occurrence of crime	Views and information on safety and security, and where appropriate, information for monitoring the evening and night-time economy.	Long-term	New/updated Local Plan evidence studies.
State of town centre environmental quality	Includes information on problems (air pollution, noise, clutter, litter and graffiti) and positive factors (trees, landscaping and open spaces).	Long-term	New/updated Local Plan evidence studies.

Table 1: Key Performance Indicators (KPIs)

The majority of the KPIs were already monitored through the RHC, prior to the publication of the PPG in March 2014, with exception to the commercial yields on non-domestic property and shopping rents. It is therefore proposed that the current monitoring framework remains unchanged, as historically it has been difficult to obtain accurate and reliable information on the commercial yields on non-domestic property and shopping rents. Maintaining the same indicators also allows for consistency and an accurate long-term comparison of data.

Local Planning Policy Context

Local Plan Part 1: Core Strategy

The Core Strategy contains one strategic policy relating to retail health, Policy CS3; whilst all lower level retail policies are set out in the Local Plan Part 2: Development Sites and Policies (DSP) Plan. The primary concern of the Core Strategy policy is to maintain the overall retail hierarchy of the Borough's Centres, with Fareham Town Centre remaining the largest. Core Strategy Policy CS3 is set out below.

CS3: Vitality and Viability of Centres

Development proposals within the Borough's identified centres will be encouraged to promote competition and consumer choice, whilst maintaining and strengthening the individual character, vitality and viability of the centre. Development will be permitted provided it maintains the current hierarchy of the retail centres:

- *Town Centre - Fareham*
- *District Centres - Locks Heath, Portchester, North of Fareham Strategic Development Area*
- *Local Centres - Stubbington, Broadlaw Walk (Fareham), Highlands Road (Fareham), Gull Coppice (Whiteley), Titchfield, Warsash and Park Gate*

Whilst each centre will be developed to promote its unique identity, the overall retail hierarchy should be adhered to.

Further policies from the Core Strategy (2011) that make reference to retail health are listed below.

- **CS8** Fareham Town Centre
- **CS9** Development in the Western Wards and Whiteley
- **CS11** Development in Portchester, Stubbington and Titchfield

The Core Strategy (2011) can be accessed from:
http://www.fareham.gov.uk/pdf/planning/CoreStrategyAdopted.pdf

Local Plan Part 2: Development Sites and Policies Plan

The Development Sites and Policies Plan (DSP) Plan, adopted in June 2015, contains a number of policies that are aimed at maintaining and improving the retail health of the Borough's Centres. The policies in the Core Strategy and DSP Plan have replaced the Local Plan Review (2000) Saved Policies. Policies from the DSP Plan that make reference to retail health are listed below.

- **DSP20** New Retail Development in Fareham Town Centre
- **DSP21** Primary Shopping Area
- **DSP22** Secondary Shopping Area
- **DSP27** Market Quay
- **DSP34** Development in District Centres, Local Centres and Local Parades
- **DSP35** Locks Heath District Centre
- **DSP36** Portchester District Centre
- **DSP34** Development in District Centres, Local Centres and Local Parades
- **DSP38** Local Shops
- **DSP37** Out-of-Town Shopping

N.B.: The performance indicator used for the monitoring of Local Plan Review (2000) Policy S7 remains applicable to the performance monitoring of DSP34: Development in District Centres, Local Centres and Local Parades.

The DSP Plan can be accessed from:

http://www.fareham.gov.uk/PDF/planning/LP2DSPAdopted.pdf

Diversity of Uses

Council officers collected data on the use of each unit in the Borough's main Centres. From this, every occupied unit was attributed a use class, providing an overall picture that demonstrates the diversity of uses in each Centre.

The basic definitions of the use classes frequently referred to in this document are:

A1	Shops for retail sale or the display of goods (other than hot food), Sandwich shops, hairdressers, funeral directors, travel and ticket agencies, post offices, hire shop for domestic or personal goods, showrooms, pet shops and internet cafes.
A2	Financial or professional services (other than health/medical services) or any services including betting office.
A3	Restaurant and Cafes. Sale of food and drink for consumption ON the premises.
A4	Pubs, bars or other drinking establishments.
A5	Takeaways. Sale of hot food for consumption OFF the premises.
B1	Business. Office (other than an A2 use), research and development of products and processes, studios, laboratories, high tech, any light industry.
B2	General Industry. Industry other than that falling within B1.
C1	Hotel, boarding or guest house where no significant element of care is provided.
C2	Residential accommodation and care to people in need of care, hospital nursing home or residential school.
D1	The provision of health services, crèche, day nursery/centre, for providing education, place of worship, public exhibition hall, museum, library and art galleries.
D2	A cinema, concert hall, bingo hall/casino, swimming pool, dance hall, skating rink, gym or other area for indoor or outdoor sports/recreation.
Sui-generis	Uses that do not easily fall into any of the use class listed above, such as car showrooms/repair facilities, nail bars etc.

Table 2: Use Class Definitions

As well as looking at use class, each unit was classified depending on the type of occupier, put into the following categories:

- **Automotive** (inc. car sales and repair)
- **Clothing** (inc. jewellery, shoes and accessories)
- **Convenience** (inc. food stores, bakers, butchers)
- **Eating Out** (inc. takeaways, restaurants, pubs)
- **Home & Electronics** (furniture and appliances, mobile phones)
- **Mixed Retail** (department stores, charity shops, large supermarkets)
- **Other** (inc. church, vets and others that fit no other category)
- **Recreation** (inc. sporting goods, cinemas, gyms)
- **Services** (inc. banks, estate agents, hotels)
- **Wellness** (inc. dentists, hairdressers, opticians)

Furthermore, it was essential to highlight the number of **vacant** units as a key indicator of retail centre health.

In terms of assessing floorspace, the total floorspace of each unit was calculated using GIS analysis. Although sales floorspace was not calculated specifically, assessing total floorspace provides a consistent method that is appropriate to the scale and scope of the assessment.

Centre Analysis

Fareham Town Centre

Fareham Town Centre is the Borough's largest and most diverse shopping destination. It serves not only the Borough, but a wider catchment area including parts of Gosport, Winchester, Portsmouth and Southampton. The Centre benefits from having almost 4,000 office workers within walking distance.

There are 368 units in Fareham Town Centre, 41 (11.1%) of which are vacant. Despite an increase in total number of units, there are 10 more vacancies than in summer 2016. This is a relatively high increase compared to recent years. It is a trend that will be monitored on an annual basis as there could be negative implications for the vitality of the town centre if it continues. The greatest loss has been to A1 units, and specifically 'Mixed Retail'. However, the town centre continues to offer a healthy range of retail groups overall. 'Services' are the most prevalent retail group (74 units), and there are also a large quantity of 'Eating Out' (56) and 'Wellness' (50) units. Fareham Town Centre includes both Primary and Secondary Shopping areas, which perform different retail functions.

	No. of units	Change	% of units
Total	368	+3	
Occupied	327	-7	88.9
Vacant	41	+10	11.1

Use Class	No. of units	Change	% of units
A1	153	-7	41.6
A2	54	-4	14.7
A3	35	+3	9.5
A4	9	0	2.4
A5	13	-1	3.5
B1	12	+2	3.3
B2	1	0	0.3
C1	2	0	0.5
D1	21	-1	5.7
D2	8	0	2.2
Sui Generis	19	0	5.2

Retail Group	No. of units	Change	% of units
Automotive	6	0	1.6
Clothing	32	-2	8.7
Convenience	17	+1	4.6
Eating Out	56	+2	15.2
Home & Electronics	23	+2	6.3
Mixed Retail	31	-7	8.4
Other	11	-2	3
Recreation	27	0	7.3
Services	74	-2	20.1
Wellness	50	0	13.6

Table 3: Fareham TC Ground Floor Unit Occupancy

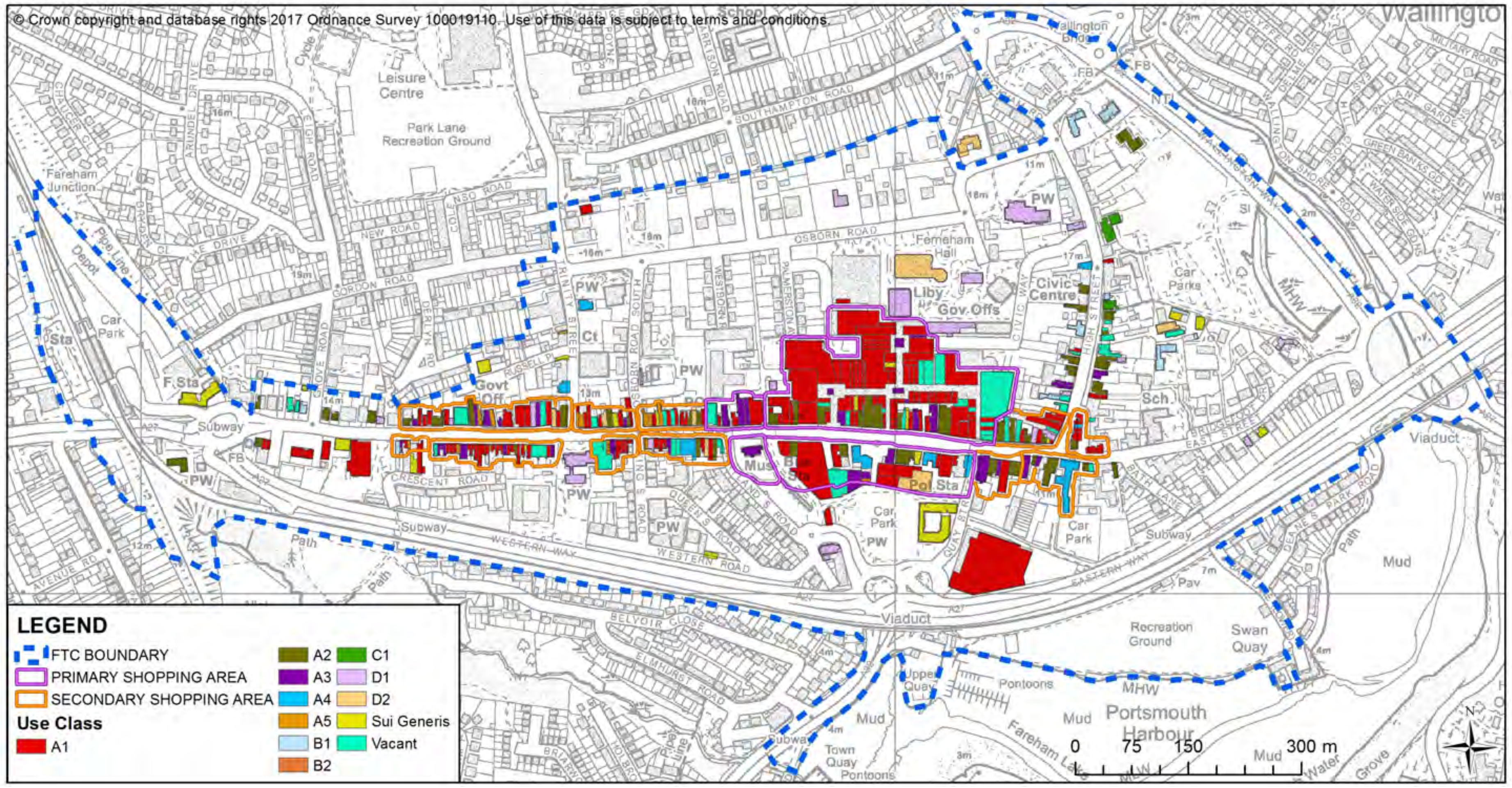


Figure 1: Fareham TC Use Classes

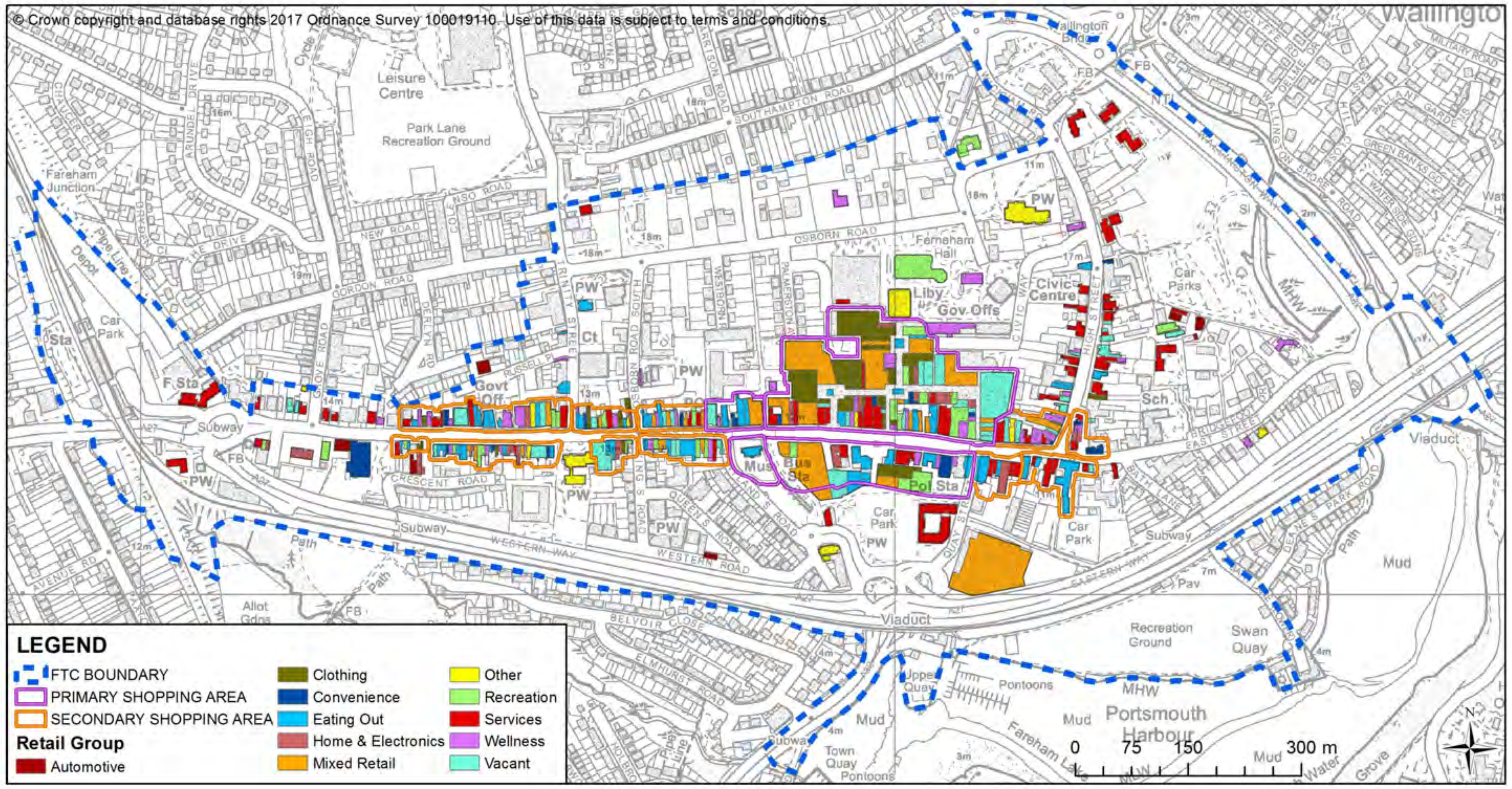


Figure 2: Fareham TC Retail Groups

Primary Shopping Area

The Primary Shopping Area has experienced most of the vacancies in Fareham Town Centre since summer 2016. The number of vacant units has nearly doubled from eight to fifteen. Ten of these lie in the shopping centre, compared to five last year. Many of these are clustered in the shopping centre's eastern wing. Significantly, BHS has closed down, leaving the fourth largest unit (2,310sqm) in the town centre disused. However, there are ongoing discussions with a potential new occupier, who should be in place before the RHC next year. The Centre still retains large chain retail outlets including M&S, Wilko, Boots, Next, New Look and TK Maxx.

Although there are seven fewer A1 units than last summer, it is still by far the dominant use class. Chart 1 demonstrates the majority of floorspace is in A1 use (64.3%), however there is more vacant floorspace (14%) than any other use class. In regard to retail groups, the number of 'Mixed Retail' units has dropped again since 2016. It was the largest retail group in 2015 with 27 units. Now there are fewer (18) than 'Clothing' (23), which has become the most prevalent.

	No. of units	Change	% of total units
Total	128	0	
Occupied	113	-7	88.3
Vacant	15	+7	11.7

Use Class	No. of units	Change	% of total units
A1	77	-7	60.2
A2	13	0	10.2
A3	14	+1	10.9
A4	3	0	2.3
A5	1	0	0.8
B1	0	0	0
B2	0	0	0
C1	0	0	0
D1	0	0	0
D2	1	-1	0.8
Sui Generis	4	0	3.1

Retail Group	No. of units	Change	% of total units
Automotive	0	0	0
Clothing	23	0	18
Convenience	6	+1	4.7
Eating Out	18	+1	14.1
Home & Electronics	10	0	7.8
Mixed Retail	18	-5	14.1
Other	1	-1	0.8
Recreation	10	-3	7.8
Services	15	0	11.7
Wellness	12	0	9.4

Table 4: Primary Shopping Area Ground Floor Unit Occupancy

Secondary Shopping Area

The Secondary Shopping Area accommodates many smaller/ independent retailers and start-up businesses. Therefore, in general, it is likely to experience high turnovers of occupiers as well as temporary vacancies. However, whilst there have been a relatively high number of vacancies in the Primary Shopping Area since 2016, only minor changes have occurred in the Secondary Shopping Area. Notably, there are two more A3 uses, which is reflected in an equal increase of 'Eating Out' units (31), and three more 'Recreation' units. There are two fewer 'Clothing' and 'Services' units.

The Secondary Shopping Area caters for a wider range of uses. Particularly, it provides more A2, A3, A5 and D-class uses. Chart 2 shows the diverse distribution of floorspace for different use classes. There is a similar amount of vacant floorspace in the Secondary Shopping Area as there is in the Primary Shopping Area. However, this level of vacant floorspace is more to be expected outside the main shopping area.

	No. of units	Change	% of total units
Total	151	+1	
Occupied	136	-1	90.1
Vacant	15	+2	9.9

Use Class	No. of units	Change	% of total units
A1	63	-2	41.7
A2	25	-2	16.6
A3	18	+2	11.9
A4	3	0	2
A5	11	0	7.3
B1	1	0	0.7
B2	0	0	0
C1	0	0	0
D1	6	-1	4
D2	5	+1	3.3
Sui Generis	4	0	2.6

Retail Group	No. of units	Change	% of total units
Automotive	0	0	0
Clothing	8	-2	5.3
Convenience	9	0	6
Eating Out	31	+2	20.5
Home & Electronics	10	-1	6.6
Mixed Retail	12	-1	7.9
Other	4	-1	2.6
Recreation	13	+3	8.6
Services	24	-2	15.9
Wellness	25	0	16.6

Table 5: Secondary Shopping Area Ground Floor Unit Occupancy

Policy Monitoring

Policy DSP34: Development in District Centres, Local Centres and Local Parades seeks to avoid the unacceptable continuous grouping of non-A1 retail uses in District Centres, Local Centres and Parades. Current unit occupancy complies with policy DSP34 as the majority of units are occupied by A1 retail uses which are spread throughout the Centre.

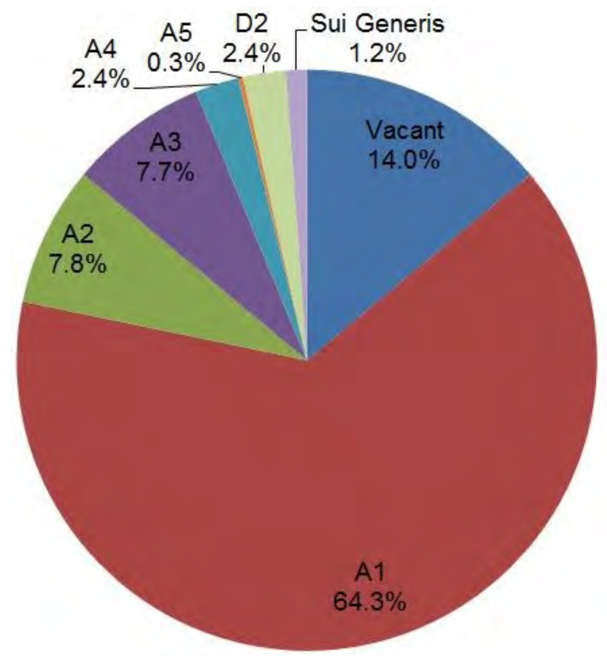


Chart 1: Primary Shopping Area: Distribution of Floorspace by Use Class

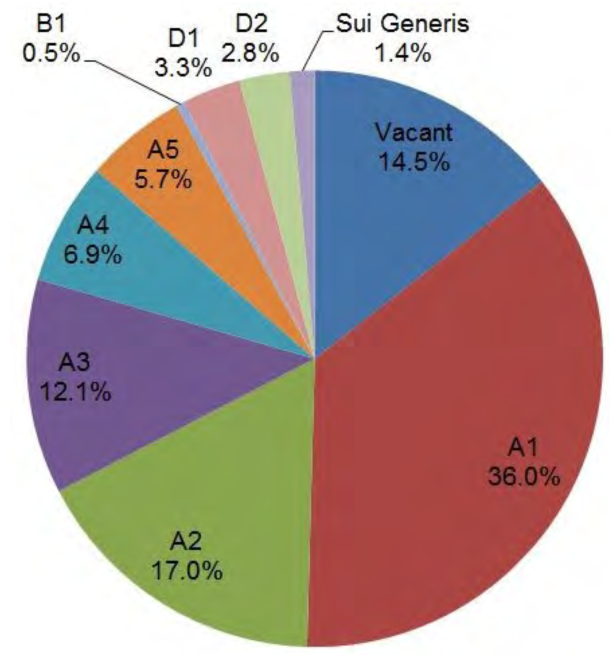


Chart 2: Secondary Shopping Area: Distribution of Floorspace by Use Class

Portchester District Centre

	No. of units	Change	% of total units
Total	70	0	
Occupied	67	-2	95.7
Vacant	3	2	4.3

Use Class	No. of units	Change	% of total units
A1	33	-2	47.1
A2	13	0	18.6
A3	4	0	5.7
A4	1	0	1.4
A5	3	0	4.3
B1	0	0	0
B2	0	0	0
C1	0	0	0
D1	4	0	5.7
D2	1	0	1.4
Sui Generis	8	0	11.4

Retail Group	No. of units	Change	% of total units
Automotive	1	0	1.4
Clothing	2	0	2.9
Convenience	5	-1	7.1
Eating Out	8	0	11.4
Home & Electronics	2	0	2.9
Mixed Retail	8	0	11.4
Other	5	1	7.1
Recreation	7	-1	10
Services	15	-1	21.4
Wellness	14	0	20

Table 6: Portchester DC Ground Floor Unit Occupancy

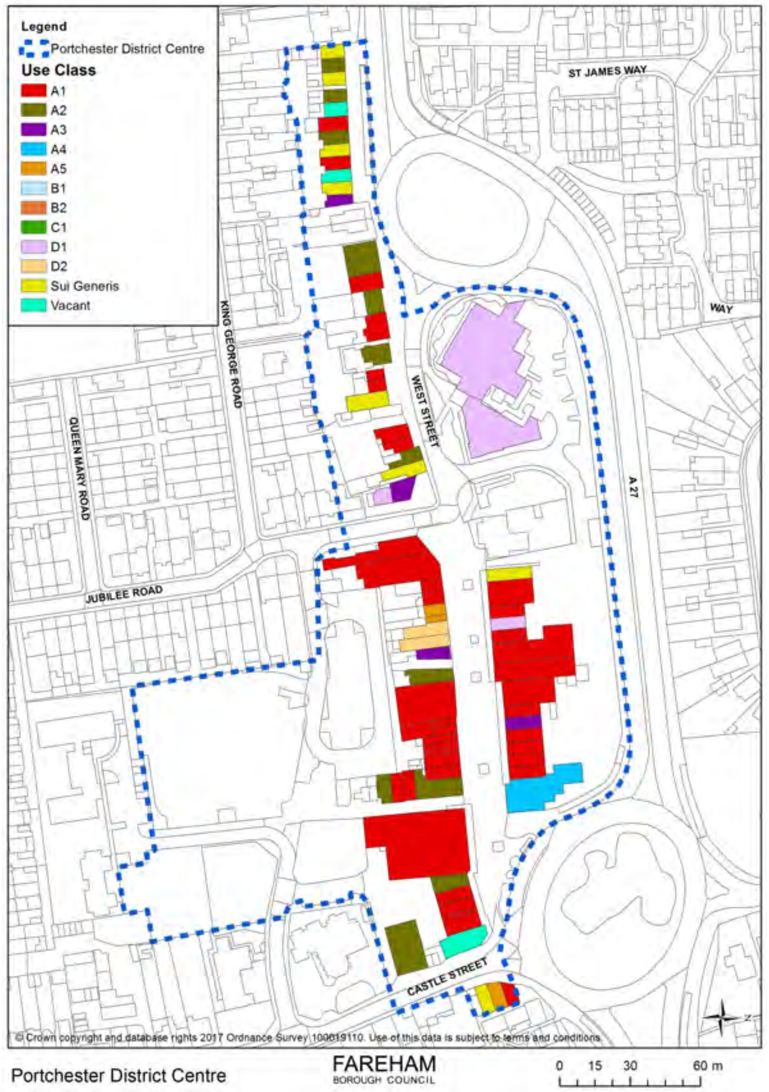


Figure 3: Portchester DC Use Classes

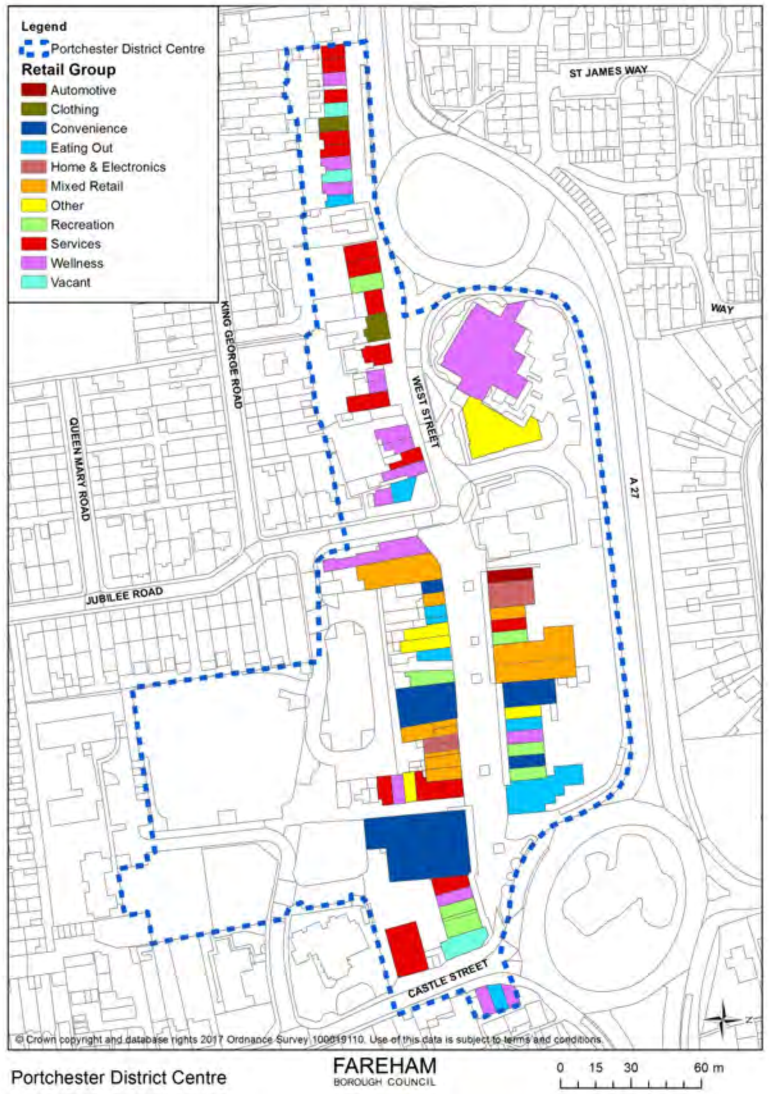


Figure 4: Portchester DC Retail Groups

Overview

Portchester District Centre, located approximately two miles east of Fareham Town Centre, serves local residents and some housing areas towards Portsmouth. There are 70 units, making it the second largest Centre in the Borough.

This summer, 67 units were observed to be occupied, two fewer than recorded in the 2016 RHC. Nearly half of the occupied units in the Centre are A1 shops (47.1%). Most of these face onto the main shopping precinct. This includes major retailers The Co-op, Iceland and Superdrug. There is a more diverse mix of use classes along West Street.

Portchester District Centre provides a variety of retail groups, though predominantly 'Services' (21.4%) and 'Wellness' units (20%). Although there are only four D1 units, they take up the second largest amount of floorspace (15.7%) after A1 uses (51.6%) because of the sizeable Portchester Health Centre and Portchester Library.

Policy Monitoring

Current unit occupancy complies with Policy DSP34, as the majority of units are occupied for retail uses.

Policy DSP36: Portchester District Centre relates to new development in Portchester District Centre. At the time of the survey, there was no new development being undertaken in Portchester District Centre. Future Retail Health Checks will provide an update as and when proposals for new development come forward.

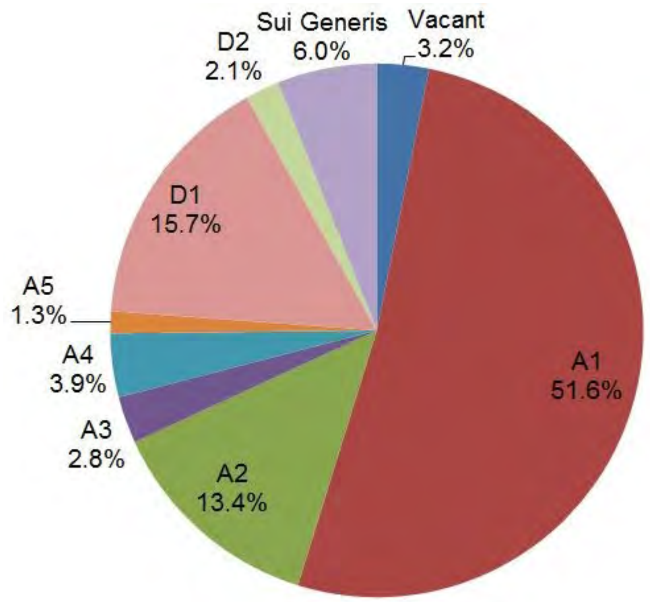


Chart 3: Portchester DC: Distribution of Floorspace by Use Class

Locks Heath District Centre

	No. of units	Change	% of total units
Total	28	0	
Occupied	28	0	100
Vacant	0	0	0

Use Class	No. of units	Change	% of total units
A1	18	0	64.3
A2	3	0	10.7
A3	3	0	10.7
A4	1	0	3.6
A5	1	0	3.6
B1	0	0	0
B2	0	0	0
C1	0	0	0
D1	1	0	3.6
D2	1	0	3.6
Sui Generis	0	0	0

Retail Group	No. of units	Change	% of total units
Automotive	0	0	0
Clothing	0	0	0
Convenience	6	0	21.4
Eating Out	6	0	21.4
Home & Electronics	0	0	0
Mixed Retail	4	0	14.3
Other	4	0	14.3
Recreation	1	0	3.6
Services	4	0	14.4
Wellness	3	0	10.7

Table 7: Locks Heath DC Ground Floor Unit Occupancy

Figure 5: Locks Heath DC Use Classes

Figure 6: Locks Heath DC Retail Groups

Overview

Locks Heath District Centre is situated in the middle of Fareham Borough's Western Wards. It serves the people of Locks Heath and the neighbouring residential areas of Titchfield Common, Park Gate, Sarisbury and Warsash. The Centre was purpose built in the 1980's around a pedestrian courtyard and is serviced by plenty of public parking spaces.

In Locks Heath District Centre all 28 units are occupied. A1 shops account for over 64% of the units and just over 73% of the floorspace, with over half of this floorspace being used for 'Mixed Retail' goods. Similar to Portchester District Centre, Locks Heath provides residents with a choice in their daily convenience needs, but is not a main shopping destination for comparison goods. It continues to be a stable and well used centre.

Policy Monitoring

Current unit occupancy complies with Policy DSP34 as the majority of units are occupied for A1 retail uses.

Policy DSP35: Locks Heath District Centre identifies the potential for the Centre to accommodate up to 2000sqm of additional convenience floorspace and additional cafés, restaurants and comparison retail units of a scale appropriate to the District Centre.

Since the summer 2016 survey there has been no additional convenience floorspace developed. Future Retail Health Checks will continue to monitor the situation and provide updates as appropriate.

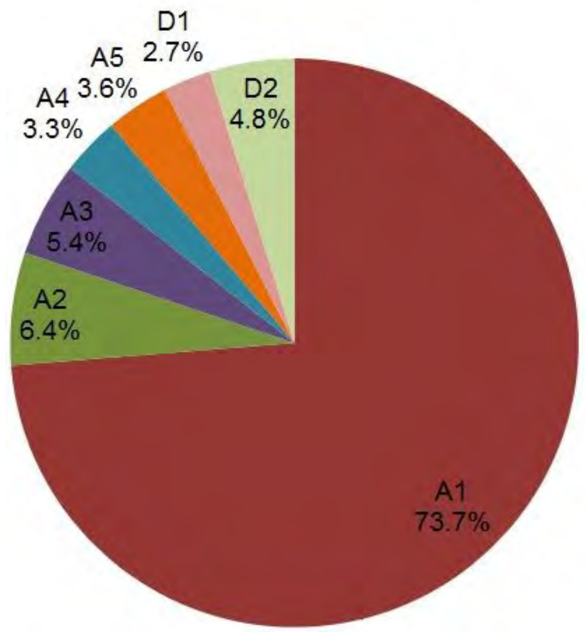


Chart 4:: Locks Heath DC: Distribution of Floorspace by Use Class

Stubbington Local Centre

	No. of units	Change	% of total units
Total	42	0	
Occupied	40	0	95.2
Vacant	2	0	4.8

Use Class	No. of units	Change	% of total units
A1	26	0	61.9
A2	4	0	9.5
A3	3	0	7.1
A4	1	0	2.4
A5	3	0	7.1
B1	0	0	0
B2	0	0	0
C1	0	0	0
D1	1	0	2.4
D2	0	0	0
Sui Generis	2	0	4.8

Retail Group	No. of units	Change	% of total units
Automotive	0	0	0
Clothing	2	0	4.8
Convenience	7	0	16.7
Eating Out	7	0	16.7
Home & Electronics	0	0	0
Mixed Retail	6	+1	14.3
Other	3	-1	7.1
Recreation	1	0	2.4
Services	7	0	16.7
Wellness	7	0	16.7

Table 8: Stubbington LC Ground Floor Unit Occupancy

Figure 7: Stubbington LC Use Classes

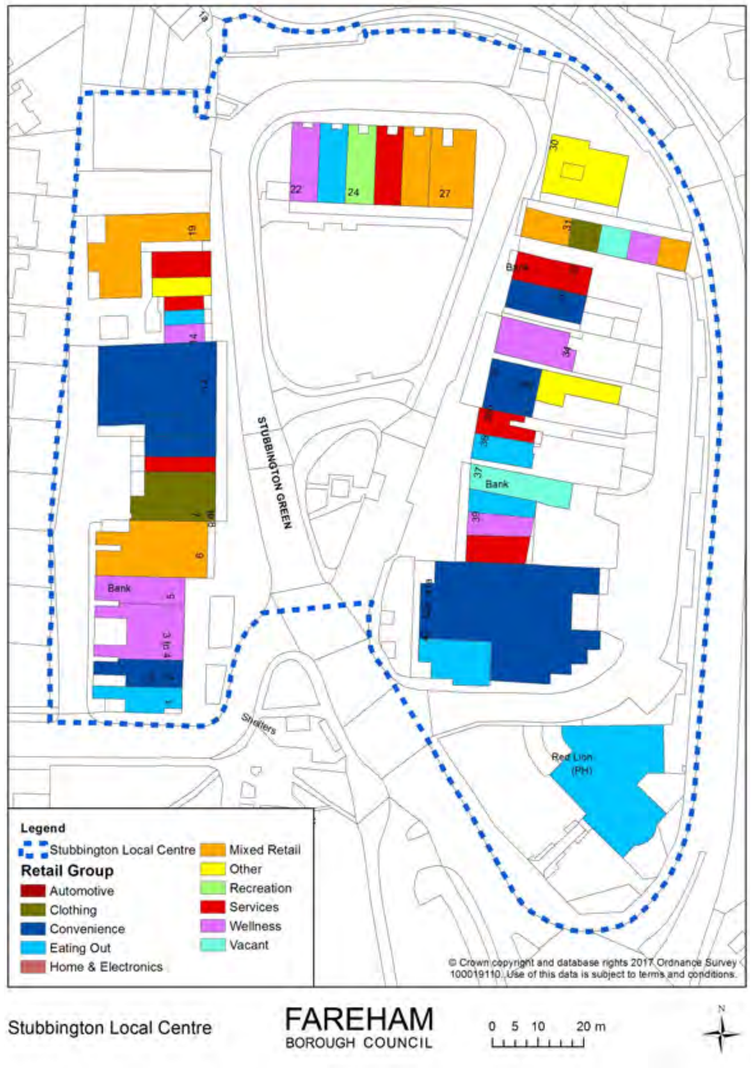


Figure 8: Stubbington LC Retail Groups

Overview

Stubbington Local Centre is located in the south of Fareham Borough, built around a small green, and serves the surrounding ward and Hill Head. In recent years, the Centre has seen the departure of Budgens, which was subsequently split into two units, now occupied by the Co-op and Costa.

There are 42 units in Stubbington Local Centre, only two of which are vacant. It predominantly consists of A1 uses; 61.9% of total units and 66.6% of floorspace. Since the summer 2016 RHC there have only been minor changes. Whilst Rowan's Hospice has vacated one of the small indoor parade units, it has moved into a larger vacant unit facing Stubbington Green. This makes six 'Mixed Retail' units in the Centre, four of which are charity shops.

The Local Centre remains home to a diverse range of retail groups that satisfy many customer needs and ensure the Centre's sustainability as a place to come for a variety of goods and services. The evidence demonstrates that the Centre continues to be stable and relatively successful.

Policy Monitoring

The current occupancy within Stubbington Local Centre is compliant with Policy DSP34 due to A1 retail being the dominant use class.

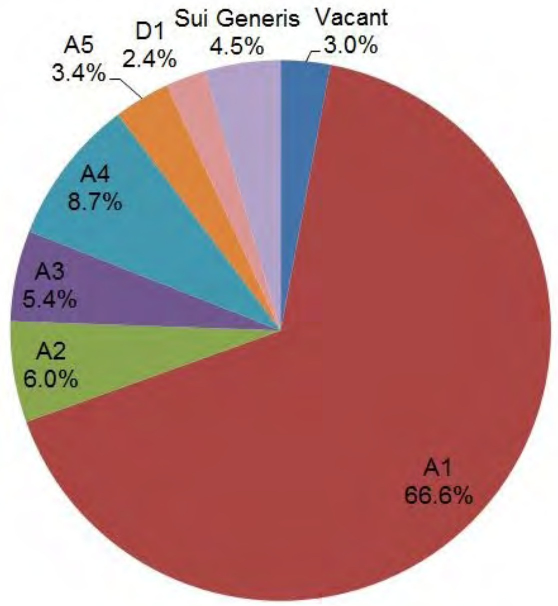


Chart 5: Stubbington LC: Distribution of Floorspace by Use Class

Park Gate Local Centre

	Number of units	Change	% of total units
Total	57	+1	
Occupied	54	-1	94.7
Vacant	3	-2	5.3

Use Class	No. of units	Change	% of total units
A1	20	0	35.1
A2	25	-1	43.9
A3	3	0	5.3
A4	0	0	0
A5	2	0	3.5
B1	1	0	1.8
B2	0	0	0
C1	0	0	0
D1	3	0	5.3
D2	0	0	0
Sui Generis	0	0	0

Retail Group	No. of units	Change	% of total units
Automotive	0	0	0
Clothing	1	0	1.8
Convenience	2	0	3.5
Eating Out	5	0	8.8
Home & Electronics	4	-1	7
Mixed Retail	0	0	0
Other	4	0	7
Recreation	3	0	5.3
Services	29	-1	50.9
Wellness	6	+1	10.5

Table 9: Park Gate LC Ground Floor Unit Occupancy

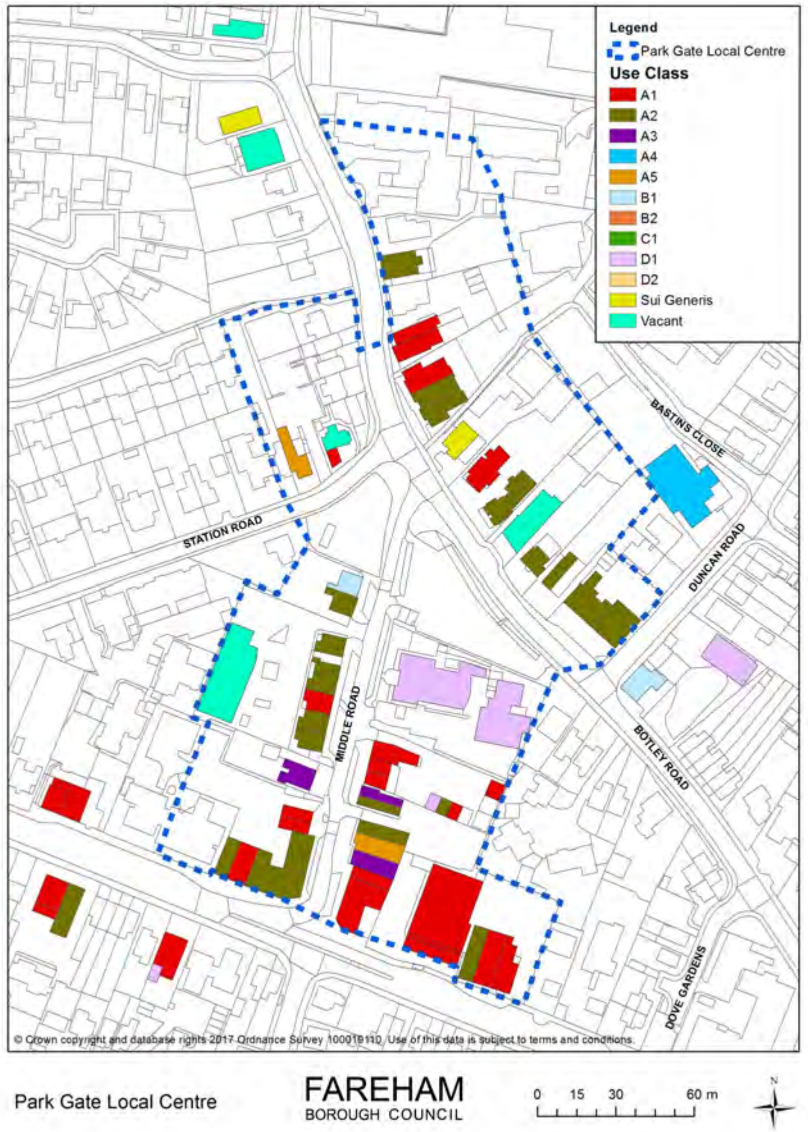


Figure 9: Park Gate LC Use Classes

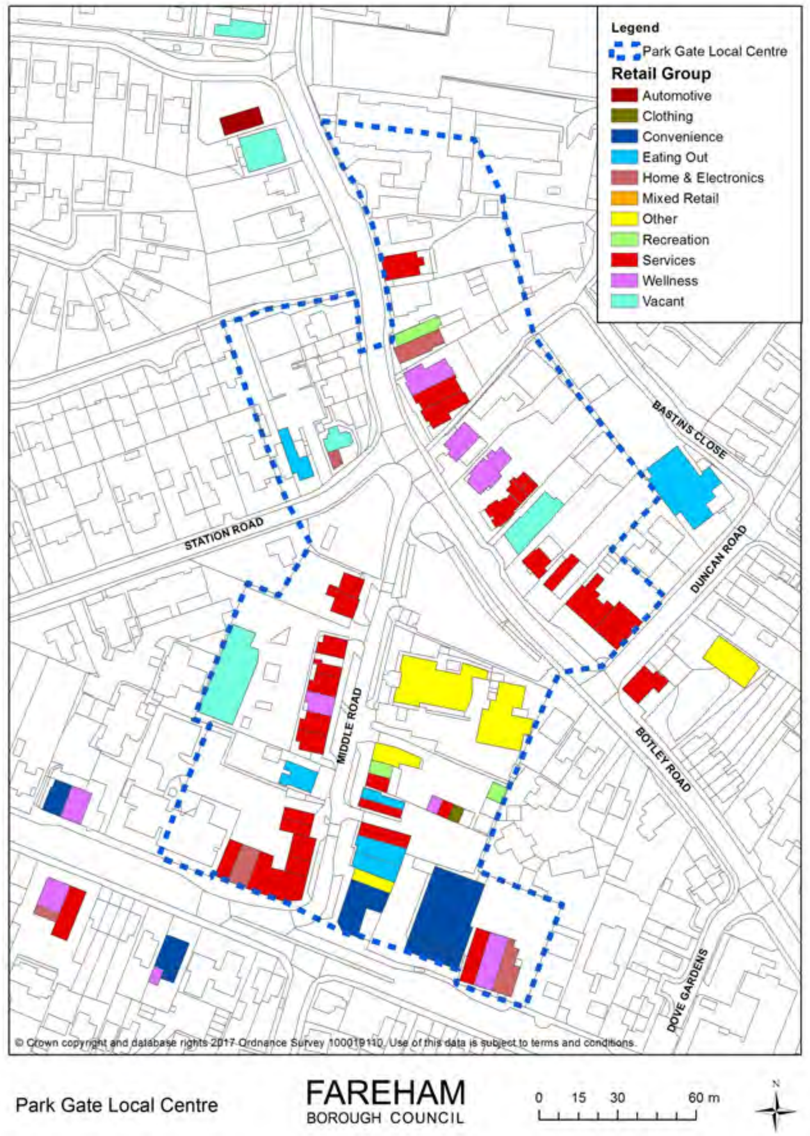


Figure 10: Park Gate LC Retail Groups

Overview

Park Gate Local Centre is situated in the west of the Borough, near Swanwick train station and the M27. It is the third largest Centre in the Borough with a total of 57 units, one more than last year because a new business has opened on Botley Road. However, the former Natwest and Wavemar Electronics buildings are now vacant.

Only a mile north of Locks Heath District Centre, Park Gate Local Centre provides a different offer. It is more oriented towards 'Services', making up over 50% of the occupied units. A high proportion of the units are for A1 (35.1%) and A2 (43.9%) uses and these also make up the majority of the floorspace, 34.6% and 32.1% respectively.

Despite being mostly service-driven, the Centre does have two important 'Convenience' stores, Sainsbury's Local (700sqm) and The Co-op (230sqm), which provide local residents with daily necessities.

Policy Monitoring

It is recognised that Park Gate is predominantly Service (A2) based and has large groupings of non-retail uses; however it is still compliant with criterion **ii** of Policy DSP34 as the uses maintain active shop window displays. It should also be noted that there is more floorspace afforded to A1 uses than A2 uses.

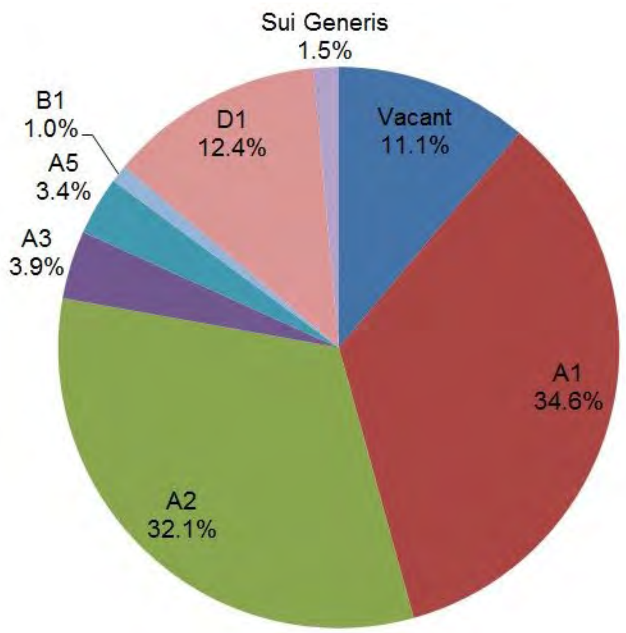


Chart 6: Park Gate LC: Distribution of Floorspace by Use Class

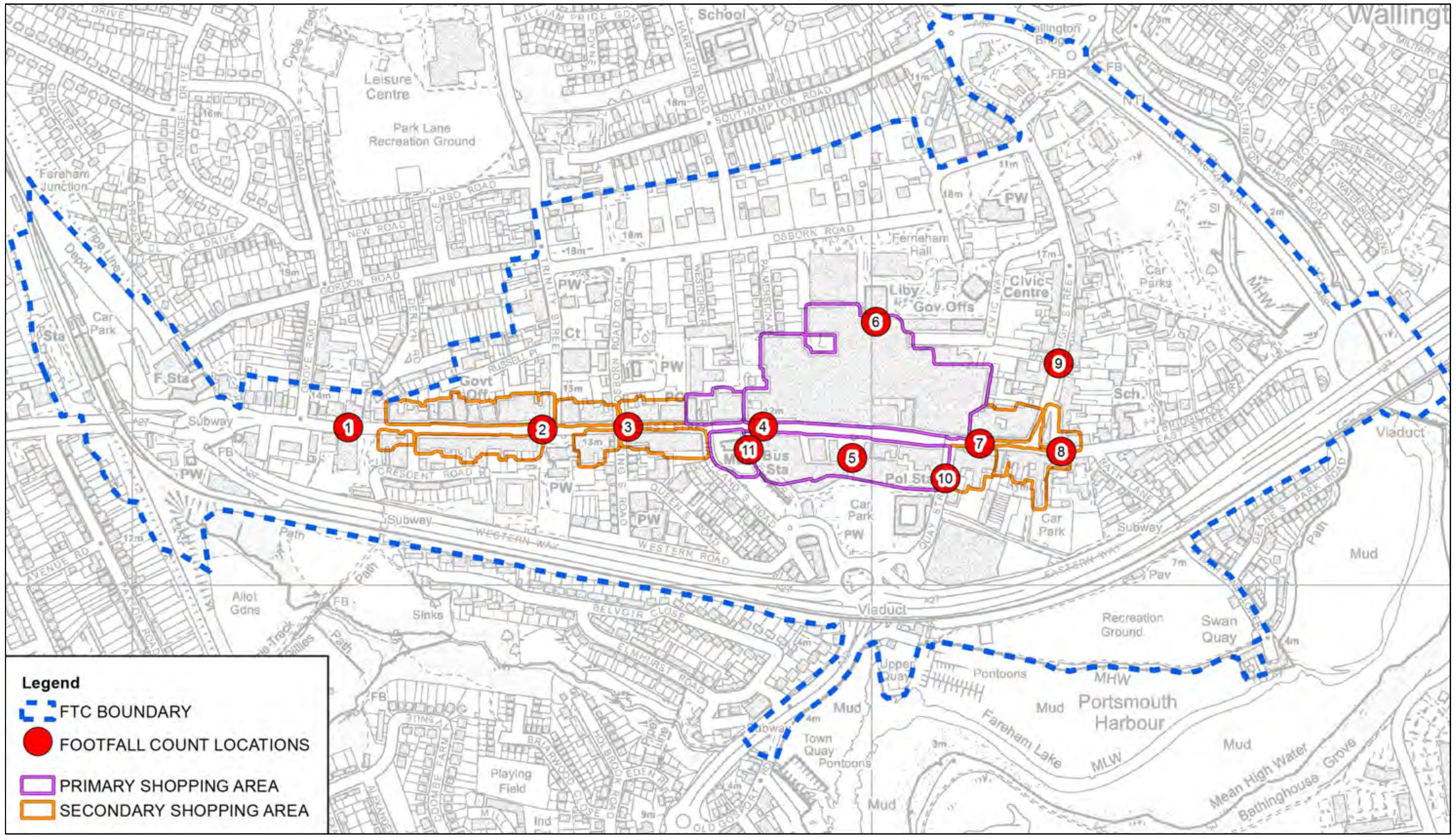


Figure 11: Footfall Count Locations Fareham Town Centre

Footfall Count: Fareham Town Centre

Method

Footfall counts were taken at the eleven locations highlighted in figure 11. These locations were selected because they represent the main entry and exit points to Fareham Town Centre. Some are strategically placed to monitor footfall between transport nodes and the town centre. For example, location 6 is between the multi-storey car park and shopping centre, and location 11 is between the bus station and West Street. The count surveys indicate the retail health of different parts of the Primary and Secondary Shopping Areas, as well as a couple of areas outside.

The footfall surveys were conducted on Friday 7th, Saturday 8th and Monday 10th July 2017; illustrating the level of pedestrian flow on a regular weekday, the weekend, and Fareham's weekly market day. This enables analysis of these particular factors on footfall counts over the years. All counts were undertaken between 10am and 12pm.

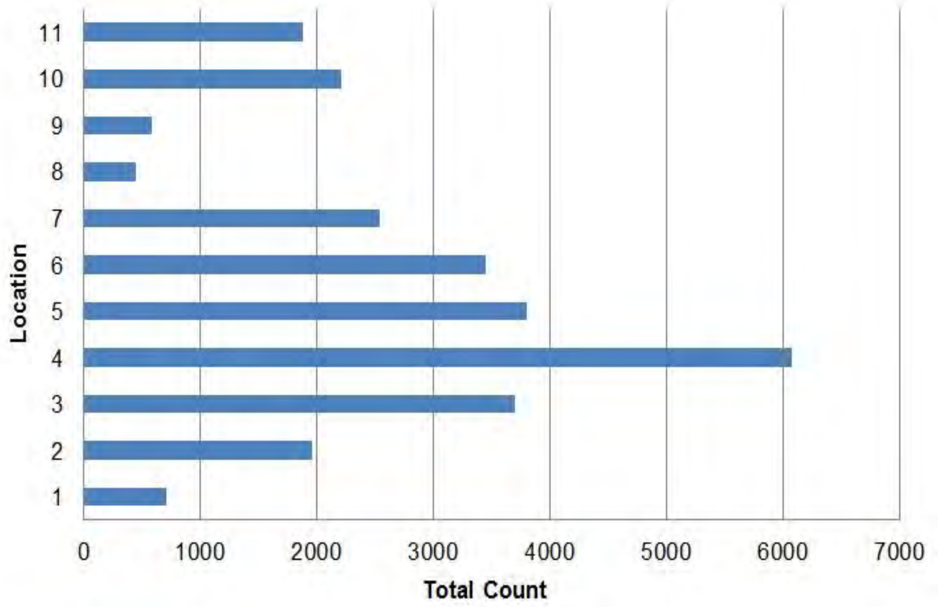


Chart 7: Total Footfall Count at each Location

Location	Footfall count per hour: Friday 7th July 2017	
1	E: 96	W: 84
2	E: 300	W: 288
3	E: 612	W: 276
4	E: 924	W: 672
5	N: 552	S: 528
6	N: 708	S: 780
7	E: 276	W: 600
8	E: 84	W: 36
9	N: 48	S: 108
10	N: 348	S: 240
11	N: 336	S: 288

Location	Footfall count per hour: Saturday 8th July 2017	
1	E: 144	W: 156
2	E: 576	W: 240
3	E: 936	W: 720
4	E: 1,296	W: 1,248
5	N: 720	S: 648
6	N: 408	S: 528
7	E: 360	W: 456
8	E: 96	W: 84
9	N: 120	S: 108
10	N: 504	S: 312
11	N: 336	S: 204

Location	Footfall count per hour: Monday 10th July 2017	
1	E: 120	W: 108
2	E: 336	W: 216
3	E: 600	W: 552
4	E: 900	W: 1,032
5	N: 780	S: 576
6	N: 468	S: 552
7	E: 384	W: 456
8	E: 84	W: 60
9	N: 96	S: 96
10	N: 432	S: 372
11	N: 384	S: 324

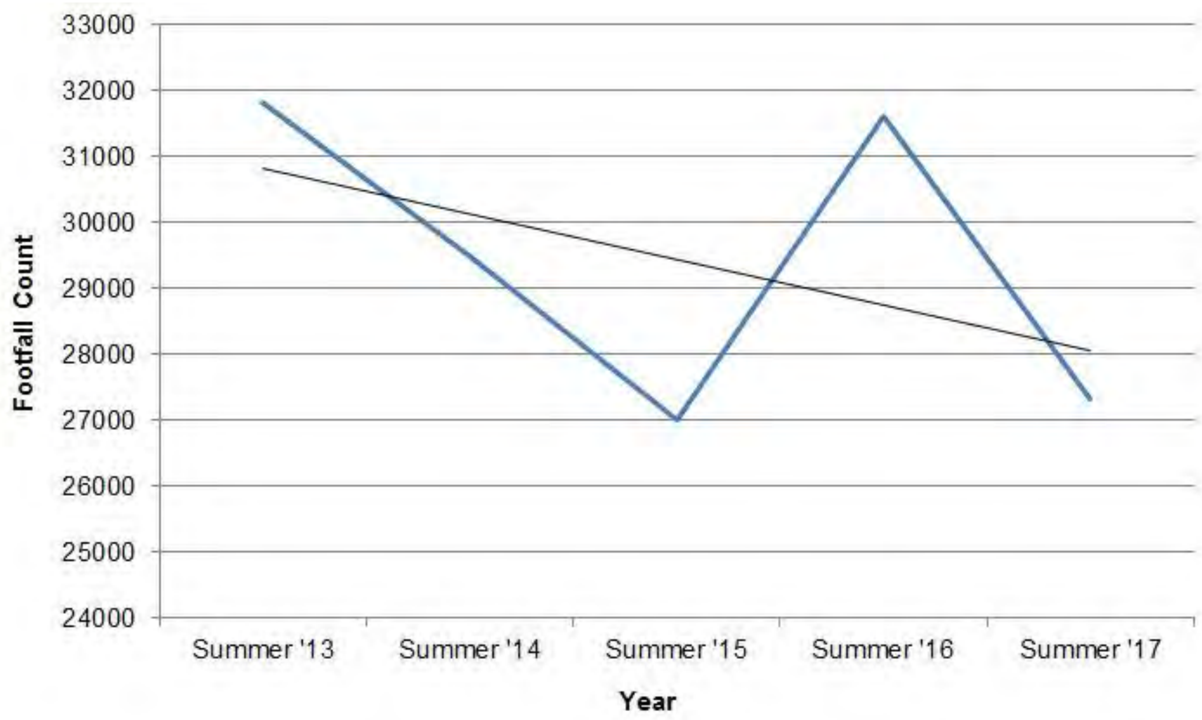
Tables 10, 11 & 12: Summer 2017 Footfall Counts

Analysis

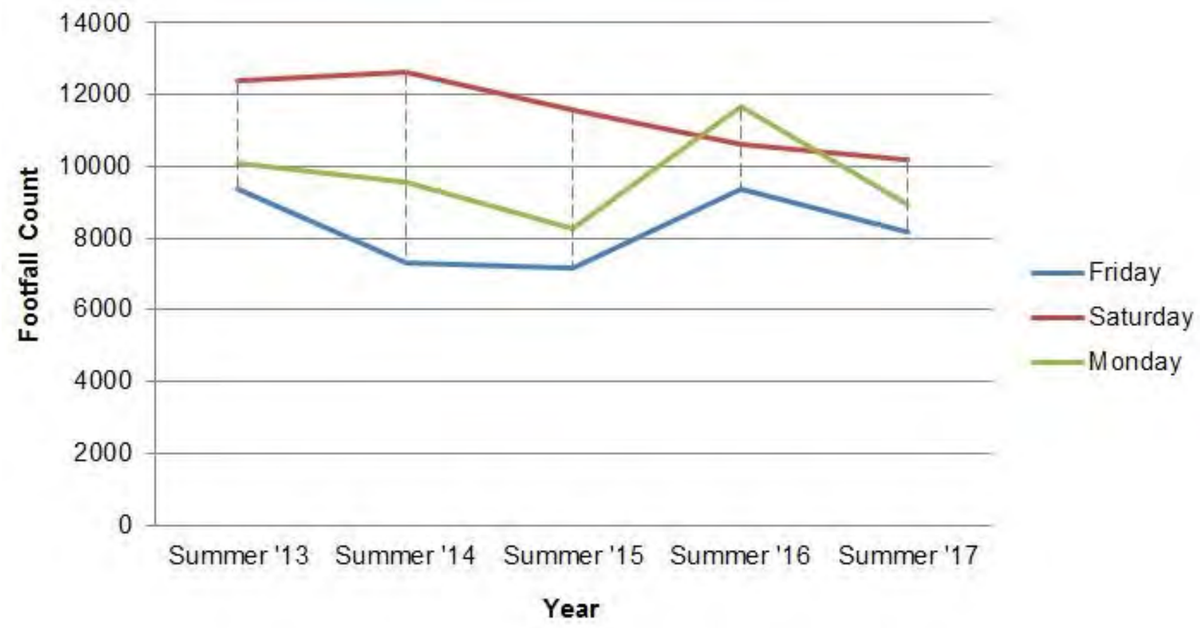
Overall, since summer 2016, there has been a decrease in footfall. Less footfall means less commercial activity. Thus, this trend indicates that there could be a correlation between decreased footfall and the increased number of vacant units in the town centre. Graph 1 shows that over the past five years the total footfall count was only lower in 2015. In summer 2016 it was relatively high, whereas this year's count corresponds more with the general downwards trend indicated by the years running up to 2016. Next year's footfall count will provide a better indication of whether or not 2016's figure was abnormal.

In terms of analysing daily footfall figures, the Saturday count has shown a steady downward trend since 2013. If this continues it could cause significant impact; especially considering businesses should benefit most from trade on Saturdays. Furthermore, as graph 2 displays, the gap between the highest and lowest count for each day is closer this year than in any preceding year. The Monday count continues to remain higher than the Friday count, illustrating the positive impact of the market on town centre activity.

Further work is being undertaken as part of the Draft Fareham Local Plan 2036 to assess the current retail performance of Fareham Town Centre and recommend any relevant adjustments to Planning Policy, to encourage the appropriate mix of uses in order to optimise its vitality and viability.



Graph 1: Total Annual Footfall Counts



Graph 2: Total Annual Footfall Counts per Day