Fareham Local Development Framework

Shaping Fareham's Future

Retail Health Checks Summary Paper

Summer 2014

FAREHAM
Local
Development
Framework

FAREHAM
BOROUGH COUNCIL

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Further Information and Contacts

Information on the general Local Development Framework process, updates on the progress of Fareham's Local Development Documents and current consultations, are available at the following website: www.fareham.gov.uk/ldf.

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For more detailed information and guidance on the planning system, visit the Department for Communities and Local Government website at http://www.communities.gov.uk.

Executive Summary.

This summary paper introduces the concept of a Retail health Check and provides a contextual history behind the theory and basis for such a study. A description of the National and Local frameworks which form the foundations for undertaking a Retail Health Check is demonstrated; along side specific policies which specifically relate to enhancing and maintaining town centre vitality and viability.

The paper is to be viewed as an update on the retail health of the Borough's core shopping districts, these are:

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

A description of each shopping facility and the type and quantity of shops located at each centre is given.

The summary gives a scrutiny of Local policies most notably policy S7: Non-retail Uses in District and Local Centres Parades and its effect on the shopping centres of the borough. The policy seeks to prohibit the increase and consolidation of non-retail units within the borough's retail centres. Results suggest that policy S7, is performing adequately with all retail centres having higher quantities of class A1 (retail) units than non-retail units. Vacancy rates across the borough have seen an improvement since the last retail health check. The primary shopping area has seen a drop of 7 vacant units since the last health check. In the other centres the results show that the units that are vacant tend to be the smaller less consolidated units in these locations; a reflection of the national trend.

Pedestrian flows were recorded in the primary shopping centre. Results continue to demonstrate that Fareham Town Centre is still the principle location for shoppers. Higher counts of pedestrians were recorded arriving from the West and North with a gradual decline of pedestrians recorded away from the centre. As with previous studies, the highest number of pedestrians recorded was on a Saturday however, count numbers are down on last year's study.

A depiction of the amount of out of town centre retail, office and leisure facilities within the borough is presented. A discussion on the implications of the changes to permitted development rights and the quantity of B1 (a) office space that is to be converted to residential C3 purposes is also given.

1. Introduction

Retail Health Checks (RHC), as a tool for assessing the vitality and viability of town centres, was first introduced in Planning Policy Statement 6: Planning for Town Centres (2005) (subsequently replaced by PPS4 and by the NPPF) as a response to the growing importance of out-of-town retail centres, the decline of town centres and “the loss of specifically urban ways of life”.

The main function of a RHC is to monitor the vitality and viability of a town centre. This reflects National Planning Practice Guidance (NPPG) which encourages Local Authorities “to plan positively to support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive, diverse places where people want to live, visit and work.” Vitality, in relation to the RHC, refers to how busy an urban centre is at different times and locations. Viability relates to the continuing ability of that centre to attract investment. A RHC demonstrates the council’s compliance with the NPPG in respect to supporting its town centre by monitoring changes over time, helping to predict future trends and preventing negative tendencies. It also allows local authorities and other organisations to measure the effectiveness of their own town centre initiatives as well as impact of competitive centres, such as nearby out of town shopping centres.

At the local level, a RHC forms an important part of the evidence base for local authority strategic development plans. Furthermore, a RHC is often used in making development management decisions and in the town centre management. Finally, robust and up to date data can be useful in bidding for funding for regeneration and improvement projects.

In Fareham Borough Council, the RHC was first undertaken in 2009. Since then, every year a check is made for the whole Borough (including the town centre, district centres and local centres) and twice a year for Fareham Town Centre only.

The content of the report varies each year, depending on the current needs. Some data is more useful when collected frequently; some can be collected annually or biannually. Table 1 shows the most used indicators, their timescale and the method of collecting data.

Table 1: Most Used Indicators, Timescales and Data Collection Methods.

Criterion	Timescale	Method of Data Collection
Diversity of main town centre uses (by number, type and amount of floorspace)	Annually (September) except for Fareham TC (6 monthly)	Review of units in town centre by observation. GIS used to calculate total floorspace.
The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations	Annually (March)	Review by observation. GIS used to calculate total floorspace.
The potential capacity for growth or change of centres in the network	Long-term	Reliant on updates to evidence studies and DPD's
Retailer representation and intentions to change representation	Long-term	Reliant on updates to evidence studies and DPD's
Proportion of vacant street level property	6 Monthly (September & March)	Review by observation
Pedestrian Flows	6 Monthly (September & March)	Review by observation
Accessibility	Annually (March)	Residents questionnaire
Customer and residents' views and behaviour	Annually (March)	Residents questionnaire
Perception of safety and occurrence of crime	Annually (March)	Residents questionnaire
State of the town centre environmental quality	Annually (March)	Residents questionnaire

The information contained in the RHC forms part of the evidence base, for example, for Fareham's Core Strategy, Local Plan Part 2: Development Sites & Policies and the Authority Monitoring Report. Furthermore, this information, and in particular data on vacant units and vacancy rates in the centres, is a material consideration in the Development Management decision making process.

The report is published on the Fareham Borough Council website at:
http://www.fareham.gov.uk/planning/local_plan/economicdev.aspx

A GIS layer, including information on commercial units, has been added onto the Fareham GIS Map also available online at:

https://maps.fareham.gov.uk/LocalViewWeb_External/Sites/in%20my%20area/# .

Finally, the results of the RHC, together with other reports prepared by independent consultants, can provide evidence for strategic planning and future actions, such as changes to the car parking charges, improvements of vacant unit facades or even the regeneration of a whole centre.

1.1 National Planning Policy Context:

Planning Policy Statement 6: Planning for Town Centres (2005) and Planning Policy Statement 4: Planning for Sustainable Economic Growth (2004)

The idea of producing RHC was first introduced in PPS6 and later in PPS4 as one of the many tools to assist with the assessment of planning policies performance against defined core output indicators through the process of an Annual Monitoring Report. The specific function of RHCs was defined by Planning Policy Statements as:

“To measure the vitality and viability and monitor the health of their town centres over time and inform judgements about the impact of policies and development, Local Authorities should also regularly collect market information and economic data, preferably in co-operation with the private sector, on the key indicators (…)”

The first list of key performance indicators (KPIs) were provided in PPS6 and then expanded in PPS4.

National Planning Policy Framework (NPPF, 2012):

The NPPF, which superseded both PPS4 and PPS6, has not altered the government's position towards RHCs. There still is a requirement for LPAs to plan positively for town centre growth and expansion, with an adequate evidence base still exists.

National Planning Practice Guidance (NPPG, 2014):

The NPPG serves to amplify the policies set out in the NPPF and to guide both the Plan-Making and Decision Making processes. It sets out which indicators should be used to determine the health of town centres. These are summarised in table 2 below.

Table 2: Key Performance Indicators for Town Centre Performance

Key Performance Indicator	Definition/Function	Suggested by
Diversity of main town centre uses	The amount of space in use for different uses such as offices; shopping; leisure, cafes and hotels.	PPS6 PPS4 BIS
Potential capacity for growth or change of centres in the network	Opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of development.	PPS6 PPS4
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.	PPS6 PPS4
Shopping rents	Pattern of movement in rents within primary shopping areas (i.e. the rental value for the first 6 metres depth of floorspace in retail units from the shop window).	PPS6 PPS4
Proportion of vacant street level property	Including primary and secondary frontage.	PPS6 PPS4

Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental)	Demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments.	PPS6 PPS4
Pedestrian flows (footfall)	A key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets.	PPS6 PPS4 BIS
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.	PPS6 PPS4
Customer and residents' views and behaviour	Regular surveys to help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities.	PPS6 PPS4 BIS
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.	PPS6 PPS4
State of the town centre environmental quality	Includes information on problems (air pollution, noise, clutter, litter and graffiti) and positive factors (trees, landscaping and open spaces).	PPS6 PPS4
Land values and the length of time key sites have remained undeveloped	Provides important indicators for how flexible policies should be framed and can help inform planning decisions.	PPS4

The majority of these KPIs were already monitored in the current RHC monitoring framework, with the exception of the commercial yields on non-domestic property and shopping rents. It is proposed that the current monitoring framework remain unchanged. This is due to the historic difficulty of obtaining accurate and reliable information on the commercial yields on non-domestic property and shopping rents.

Maintaining the same indicators also allows for a more accurate long term comparison of data.

Planning for Town Centres: Practice guidance on need, impact and the sequential approach (2009)

This practice guidance explains the importance of understanding long term trends to provide "robust policies"; which improve investor confidence and certainty in complex/large scale Town Centre development and regeneration schemes. The guidance stresses that regular assessments of Town Centre performance are needed. In addition, comparing the results to national trends and to similar centres can indicate whether the centre is "improving, stable or declining" and how resilient it is to a change. This information can then be used to help to make sensible and accurate policy decisions.

Department for Business, Innovation & Skills (BIS): Understanding High Street Performance (2009)

BIS guidance recognises the importance of collecting evidence to assess the performance of the high street, especially during an economic recession and to understand changes in consumer behaviour (online shopping etc.).In their view the modern High Street should not only encompass retail function but also leisure, entertainment functions. BIS states that by using KPI assessment in conjunction with information on other competing centres, Local Authorities can "develop understanding of the relative roles, strengths and weaknesses, and impacts on each other….. and can judge whether a high street is succeeding, failing, stable or in transition".

Urban and Economic Development Group (URBED, 1994): Vital and Viable Town Centres: Meeting the Challenge

URBED recommends an alternative approach to measure the vitality and viability which is based on three qualities. These are: attractions, accessibility and amenity. Attractions include Town Centre features which attract customers, such as variety of shops, business space and residential accommodation. Accessibility includes availability and variety of quality transport options. Amenity is the environment and the identity of the town centre, including appearance of public spaces, and perception of safety. URBED suggests that the results should be compared with neighbouring centres.

1.2 Local Planning Policy Context:

Local Plan Review (LPR), 2000 (Saved Policies)

Local Plan Policies are monitored so as to establish their effectiveness in achieving the strategic objectives which were the basis of their formulation. The Council notes that with the prevailing economic market, some of these objectives may not have been achievable. Of the Policies that refer to retail issues in the borough, only one can be quantified. This policy, set out below, will be viewed in greater detail in the Monitoring section of this paper.

- **S7: Non-Retail Uses in District and Local Centres and Parades.**

Core Strategy, 2011

The Core Strategy contained only one policy pertaining to retail health; this is because all lower level retail policies are to be joined in the Local Plan Part 2: Development Sites and Policies (DSP) whilst the Core Strategy retains the strategic policies on retail health. The primary concern of the policy was to maintain the overall retail hierarchy of the Borough's Centres with Fareham Town Centre being the largest. The policy pertaining to retail health 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.

The policies listed below, also refer and relate to retail health.

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

Submission Local Plan Part 2: Development Sites and Policies (DSP) Plan

The DSP Plan is a completion of the Core Strategy and has been submitted to the Planning Inspectorate for independent examination. It contains various policies that are aimed at maintaining and improving the retail health of the borough's Centres. Once adopted these policies will replace the LPR Saved Policies. The relationship between DSP policies and those from the Local Plan Review (2000), including those that will be replaced or retained, are set out in table 3 below.

Table 3: Local Plan Review Policies and Replacement Policies

Local Plan Review Policy	Replacement Policy
S1: Fareham Town Centre Strategy	EXPIRED 2007 CS3 The Vitality and Viability of Centres (LP 1) CS8 Fareham Town Centre (LP 1)
S2: Shopping in the Retail Core, Fareham Town Centre	CS3 The Vitality and Viability of Centres (LP 1) CS8 Fareham Town Centre (LP 1) DSP20 New Retail Development in Fareham Town Centre (LP 2)
S3: Non-Retail Uses in the Retail Core, Fareham Town Centre	CS3 The Vitality and Viability of Centres (LP 1) CS8 Fareham Town Centre (LP 1) DSP21 Primary Shopping Area (LP 2) DSP22 Secondary Shopping Area (LP 2)
S4: Market Quay, Fareham	EXPIRED 2007 DSP27 Market Quay (LP 2)
S6: Shopping Development in District and Local Centres	CS3 The Vitality and Viability of Centres (LP 1) CS9 Development in the Western Wards and Whiteley (LP 1) CS11 Development in Portchester, Stubbington and Titchfield (LP 1) DSP34 Development in District Centres, Local Centres and Local Parades (LP 2) DSP35 Locks Heath District Centre (LP 2) DSP36 Portchester District Centre (LP 2)
S7: Non-Retail Uses in District and Local Centres and Parades	DSP34 Development in District Centres, Local Centres and Local Parades (LP 2)

S8: Retention of Local Shops	DSP38 Local Shops (LP 2)
S9: New Local Shops	DSP38 Local Shops (LP 2)
S10: Out-of-Centre Shopping	CS3 The Vitality and Viability of Centres (LP 1) DSP37 Out-of-Town Shopping (LP 2)
S11: Retail Warehouses	CS3 The Vitality and Viability of Centres (LP 1) DSP37 Out-of-Town Shopping (LP 2)
S12: Hot Food Shops	CS3 The Vitality and Viability of Centres (LP 1) DSP39 Hot Food Shops (LP 2)
S13: Garden Centres	CS14 Development Outside Settlements (LP 1) DSP37 Out-of-Town Shopping (LP 2), DSP24 Mix of Uses in Fareham High Street

Once adopted these policies will be monitored in subsequent Retail Health Checks.

1.3. Retail Health Check Toolkit: Key Performance Indicators (KPIs):

In order to fully understand the state of the town centre it is necessary to maintain a level of understanding of the key performance indicators (KPIs) which help determine the health of a town centre, these are stipulated by the relevant literature and national planning guidance and have been summarised in previous chapters. The Local Authority has the ability to choose which KPIs to include in their Retail Health Checks. Whilst some of the KPIs are continually evolving, for example proportion of vacant street level property, others may stay stable for longer periods of time, for example retailer representation or the potential capacity for growth and change in centres. For this reason, it is not appropriate to review each criterion over the same timescale. Table 4 shows the proposed timescale for reviewing each criterion, and how information will be gathered.

Table 4: Proposed Time Scales for Reviewing KPI Criterion.

Criterion	Timescale	Method of Data Collection
Diversity of main town centre uses (by number, type and amount of floorspace)	Annually (September) expect for Fareham TC (6 monthly)	Review of units in town centre by observation. GIS used to calculate total floorspace.
The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations	Annually (March)	Review by observation. GIS used to calculate total floorspace.

The potential capacity for growth or change of centres in the network	Long-term	Reliant on updates to evidence studies and DPD's
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Proportion of vacant street level property	6 Monthly (September & March)	Review by observation
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Perception of safety and occurrence of crime	Annually (March)	Residents questionnaire
State of the town centre environmental quality	Annually (March)	Residents questionnaire

2. Updates since Autumn 2013 Paper

This summary paper provides a limited but important update to the health of the retail centres within Fareham Borough, and in particular Fareham Town Centre. Regular updates are important to maintain the continuity of the datasets and the validity of analyses and conclusions.

This year, a new layer of analysis based on policy objectives will be undertaken. Through this exercise the council will monitor if policies aimed at ensuring the viability and vitality of centres are effective. So as to update the evidence base the analysis will be backdated to the first RHC of 2009. This will provide a longer data set for analysis and comparison.

The Policies to be monitored are: Local Plan Review (Saved Policies), S7: Non-Retail Uses in District and Local Centres and Parades. The results of these findings are set out in **Chapter 3**.

Policies from the Publication DSP Plan, namely, DSP 22: Secondary Shopping Area (Fareham Town Centre); DSP34: Development in District Centres, Local Centres and Local Parades; DSP39: Hot Food Shops will be monitored once the DSP Plan is adopted.

In addition to this, the analysis has been altered to present a more accurate picture of the retail distribution. Use Classes are now presented as a percentage of the units in use as opposed to the overall no. of units (including Vacancies).

Diversity of uses in Fareham Town Centre and vacancy rates within the major centres within the Borough have been analysed and their records updated. The centres analysed were:

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

The findings are presented in **Chapter 4** and **Chapter 5** and detailed information is included in subsequent **Appendices** which are located at the end of this document. This chapter also shows how these vacancy rates are changing over time compared to previous summary papers and the national average.

This RHC also incorporates new and relevant government amendments to changes in use classes that do not require planning consent. Such new permitted rights affecting this study are changes from B1(a), A1 and A2 use classes to C3 Residential.

Finally, new pedestrian footfall counts have been recorded in **Chapter 6**. These show the movement of pedestrians throughout Fareham Town Centre on different days of the week, and how this has changed over time. To provide better clarity to the reader, the footfall counts for the Retail Health Checks have been reclassified as winter and summer Counts rather than autumn and spring as with previous studies. This change has been made in line with the publication of the RHC’s (in winter and summer). In addition, the changes reflect the time of year the surveys were carried out on for example, in November for 2013, and July 2014.

Amount of retail, leisure & office floorspace in "out of Town" and "edge of centre" locations is included in **Chapter 7**, although this has not changed significantly since last retail checks.

3. Diversity of Uses

The diversity of town centre uses is assessed based on observation. This provides us with data for the use of each unit, from which we can ascertain the split of use classes within the Primary and Secondary Shopping Areas.

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.

Floorspace calculations were taken as the total floorspace of each unit as calculated by GIS mapping. Whilst this does not take account of differences between total and sales floorspace figures it does provide general figures which can be used.

As well as looking at the use class, each unit was also classified dependent on the type of occupier. The categories for the different types of occupier were:

- Vacant
- 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)

This gives us a fair impression of the types of units that are currently within the centre, with an ideal position being that each category is represented, with no particular category dominating.

3.1 Fareham Town Centre

Fareham Town Centre continues to be undoubtedly the Borough's largest and most diverse shopping destination serving not only the Borough, but a wider catchment area including parts of Gosport and Winchester. Within the Town Centre there were 351 ground floor units recorded, 32 (9.12%) of which are currently vacant.

The Town Centre is divided into Primary and Secondary Shopping Areas, the boundaries of which are shown in figure 1 below. It is important to control the mix of uses in these locations, especially the Primary Shopping Area as they act as the heart of the Centre and are the main draw for shoppers and other visitors. Rising vacancy rates or an inappropriate mix of uses can deter visitors and potentially harm the long term viability of the Town Centre.

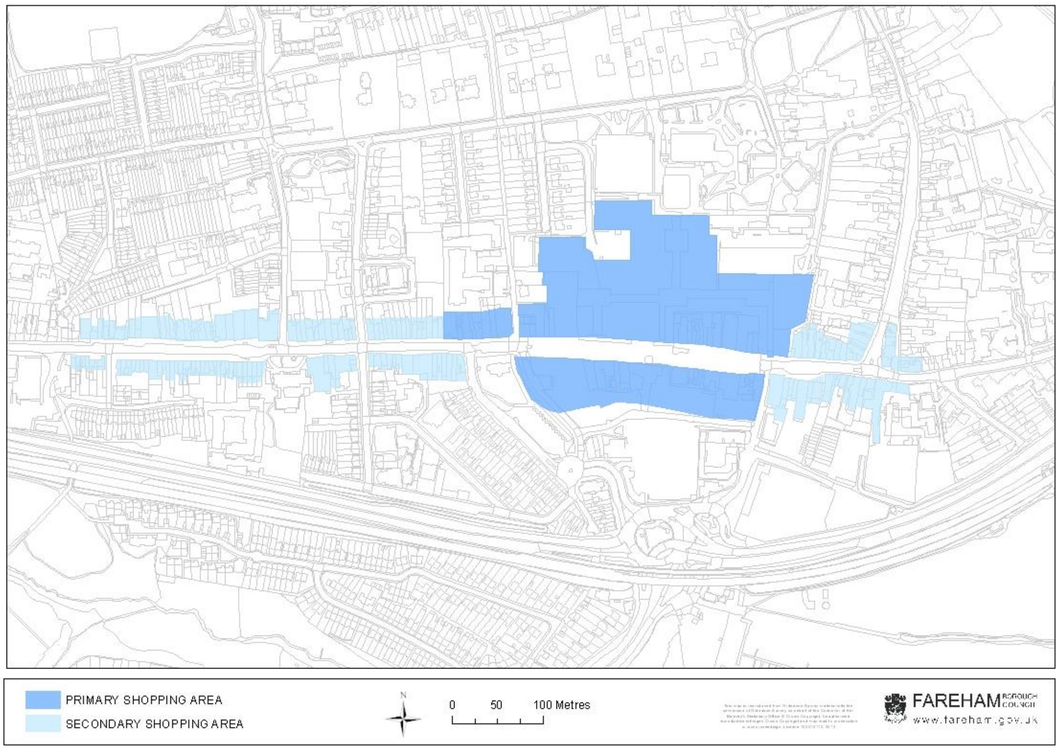

Figure 1: Primary and secondary Shopping Areas

Currently 6.62% (9 units) of all the units in the **Primary Shopping Area** are vacant. Of the occupied units, nearly 70% are shops (A1). These units account for 73.09% of the total floorspace, which means that the majority of the larger units are in A1 use, such as BHS, M&S, Wilkinson, Boots, Next and New Look. Other than a number of small cafes and a beauty salon, the indoor Shopping Centre is almost entirely made up of A1 shops, with the pedestrianized area of West Street offering a more varied mix of uses including a concentration of banks and building societies in the central area.

In terms of types of occupiers, the number of mixed retail stores (including department stores, charity shops, and supermarkets) has remained unchained since the Winter Health Check at 22 units representing 18.49% of occupied units. The number of clothing stores has fallen by 2 to 20 (16.81 % of occupied units) compared to this time last year and has been replaced as the most represented occupier type in the Primary Shopping Area by Mixed Retail. The third most represented retailer types are Wellness and Services, each occupying 18 units (together making up 26.05% of all units). Convenience shops, Home & Electronics and Recreation are less represented. The most significant change within the Primary Shopping Area has been the fall in the number of vacant units. Compared to last summer the number of vacant units has reduced from 14 to 9 representing a 36% fall. This is a sign of a resurgence observed since the last Health Checks and goes someway to proving unfounded the concerns of Whiteley Shopping Centre taking trade and shops away from Fareham Town Centre.

With regard to changes in retailers occupying this area R Ayling Jewellers, Hug-the-Jeweller and Skoolkit vacated their premises and independent jewellers Two Kings of Fareham occupied the former R Ayling Jewellers unit.

Vacant units make up 10.31% of all units in the **Secondary Shopping Area.** Of the occupied units, 40% are A1 shops. A high proportion of units (22.5%) are A2 service type units with a concentration of estate agents on the eastern end of West Street. The number of A1 units has risen since the last health check by 8, this is another indicator of the improving retail market. One of the most significant changes related to retailer representation within this area is the closing down in recent years of the only fishmonger in Fareham, P&S Cripps, which had traded in the Centre for almost 100 years.

The **Secondary Shopping Area** also accommodates a significant number of smaller/independent retailers and start-up businesses and unsurprisingly experiences rapid turnover of occupiers and high levels of temporary vacancies. The Council welcomes variety in business types in this area by being flexible and less strict when considering planning applications for a change of use. Recently, several planning permissions were granted for new cafes/restaurant uses that are expected to attract more customers to this part of Fareham Town Centre, enhancing its vibrancy. The footfall levels to these areas will be monitored in subsequent Retail Health Checks.

The mix of occupier types in the Town Centre is generally difficult to control. However, maintaining a good supply of A1 shops, especially in the Primary Shopping Area, will ensure that the retail heart of the Town is retained. The

Publication Local Plan Part 2: Development Sites and Policies has developed appropriate policies regarding appropriate uses within Fareham Town Centre. Once adopted, the performance of these policies will be monitored to assess their effectiveness.

3.2 Portchester District Centre

Portchester is a District Centre which principally serves the residents of Portchester, as well as residential areas to the East, within the boundary of Portsmouth City Council. The Centre has 68 units, making it the second largest Centre in the Borough, with only two units currently vacant, one less than the last health check, giving a vacancy rate of 2.94%

Of the occupied units, A1 shops make up over half of the units (53.03%) and include all the Centre's largest retail units such as Superdrug, Iceland, Coopers and Co-op. A relatively high proportion (17%) of occupied floorspace is given over to D1 uses, mainly because this includes large buildings, such as Portchester Health Centre and Portchester Library.

Portchester still has a high proportion of service units (22.73%) and wellness units (16.67%), with a low number of clothing, home and electronics and “other uses” units. This goes to show that Portchester is a provider of local services rather than a destination for comparison shopping.

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3.3 Locks Heath District Centre

The Centre at Locks Heath is centrally located within the residential areas in the Western part of the Borough. It serves not only the residential population of Locks Heath, but also the neighbouring residential areas of Titchfield Common, Park Gate, Sarisbury and Warsash. The Centre was purpose built in the 1980's and is designed with a pedestrianized courtyard area in the middle. There are currently 26 units within the Centre, of which only one is vacant, one more than in summer 2013.

One unit became vacant last year as a result of the departure of MyCheating.com a Private Investigation business. The most recent and notable change was the departure of The Co-op and its replacement by Waitrose.

In Locks Heath District Centre, A1 shops account for over 66% of the units and just over 73% of the floorspace, with over half of this floorspace being used for convenience goods. The majority of the Centre's largest units are convenience units including Waitrose, Iceland and Martins Newsagents.

In a similar way to Portchester District Centre, Locks Heath provides residents with a choice in their daily needs, but is not a main shopping destination. Locks Heath Centre does continue to be a stable and well used centre.

3.4 Stubbington Local Centre

The Local Centre in Stubbington is centrally located within the combined residential areas of Stubbington and Hill Head. The Centre is arranged in a horse shoe shape around a public space in the Centre. It currently has 42 units, only one of which is empty. The past year has seen the departure of Budgens which was split into two units, now occupied by the Co-op and Costa Coffee respectively. The past year also saw the arrival of Dominos Pizza which replaced a Chinese restaurant.

Almost 60% of the Centre's occupied units are A1 shops, with a further 20% being A2 units. Stubbington has more service units than any other occupier type, but is still represented by all occupier categories in some way, except for automotive.

From the recent additions as stated above, it is evident that Stubbington Local Centre is still a stable and relatively successful Centre.

3.5 Park Gate Local Centre

In terms of numbers of units, Park Gate Local Centre is the third largest Centre in the Borough with 57 units. Of the 57 units within the defined boundary of the Centre, only two are currently vacant, one less than last year: There have been a few changes in the Centre, firstly with the loss of Bel Amour Women's Fashion, Complete Electrical, Park Gate Traditional Butchers and Quay Motors. The Informer, a publishing company has relocated within the centre but does not appear in this update as it no longer occupies a ground floor unit. There were a number of new additions namely, Ascot Estate Agents and Beal's Estate Agents

Park Gate is a much more service orientated centre than other centres in the Borough. This is reflected by the fact that Service units account for nearly 53% of the units in occupation.

There are very few large retail units in the Centre, with the Co-op and Lloyds TSB amongst the largest, both below 500sq.m. By comparison, the adjacent Indespension Trailers unit, fronting Bridge Road, is over 700sq.m in size.

3.6 More Information: retail representation

Data sheets, showing the exact breakdown of uses and occupier type in all Centres, as well as the Primary and Secondary Shopping Areas of Fareham Town Centre, and Maps showing the spread of uses and occupier types, are available in the Appendices.

As outlined in the previous chapter, Fareham Town Centre hosts 351 units, 161 of which are occupied by various retailers. This equates to over 50% of all occupied ground floor units within the Town Centre and, although it exceeds the national average of 29%, such a proportion is expected in a high order centre like Fareham.

Fareham Shopping Centre provides a good store variety offer, including Marks and Spencer's, BHS and Debenhams acting as strong anchor stores. Other key retailers in the comparison goods sector, located within the Shopping Centre include: Boots, Waterstones, Clarks and Superdrug. Moreover, the Centre still offers a number of fashion retailers such as Next, Top Shop, New Look, River Island, Dorothy Perkins, Monsoon and Bon Marche.

Other main multiple retailers represented outside of the Shopping Centre include Wilkinson’s, Peacocks, WH Smith, Argos, Robert Dyas and TK Maxx.

In terms of leisure uses, the Town Centre also provides an attractive offer. The main café/restaurant operators include Ask, Antonio’s, Costa Coffee, Nando’s, Subway, Café Nero and Burger King, and the main leisure uses are provided by LA Fitness Health Club and Apollo Cinema. Whilst Chicago Rock Café closed recently, several new cafés opened in the West Street Speciality Shopping Area. March 2014 also saw the opening of Slug and Lettuce after the vacation and transformation of the unit formerly known as the Vanguard.

The Town Centre is also well represented by operators providing a wide range of goods and services, such as those selling gifts, household goods, jewellery and health and beauty salons.

In recent years, Fareham Town Centre has seen a rise in the numbers of charity shops. Although this could be seen by some as a sign of decline, it should also be interpreted as an indication of resilience and adaptability. It is generally accepted that town centres with a wide range of uses are less vulnerable to technological or fashion changes that could lead to the loss of particular markets. Therefore, within the current economic circumstances, this trend should not be seen as negative.

3.7 Policy Monitoring

As stated in the changes to the RHC, this section of the chapter will monitor policy performance. The policy to be assessed is set out below:

- S7: Non-Retail Uses in District and Local Centres and Parades;

S7: Non-Retail Uses in District and Local Centres Parades

Policy S7 seeks to avoid the extension or consolidation of non-retail uses in District and Local Centres and Parades. It also deems acceptable development that is non-retail in nature but would provide a service appropriate to a shopping centre, such as financial and professional services, a launderette, café or restaurant. This policy applies to all centres with the exception of Fareham Town Centre.

Portchester District Centre

Table 5: Retail Units, Portchester District Centre

Retail (A1) units	35	
Non – Retail units	31	

From table 5 it is clear to see that retail (A1) uses are the dominant use within the centre. In the case of Portchester District Centre, the policy has been effective.

Locks Heath District Centre

Table 6: Retail Units, Locks Heath District Centre

Retail (A1) units	16	
Non – Retail units	9	

The policy has also been implemented effectively in the case of Locks Heath district Centre as shown by table 6.

Stubbington Local Centre

Table 7: Retail Units, Stubbington Local Centre

Retail (A1) units	24	
Non – Retail units	17	

The same is true in terms of the policy's implementation within Stubbington Local Centre (table 7).

Park Gate Local Centre

Table 8: Retail Units, Park Gate Local Centre

Retail (A1) units	19	
Non – Retail units	36	

In the case of Park Gate (table 8) the policy, at face value, would seem to have been ineffectively administered. However part **(B)** of the policy allows for the change of use from retail A1 to non-retail provided that the proposed change would provide a service appropriate to a shopping centre, such as financial and professional services, a launderette, café or restaurant. It is therefore important that the units in use be viewed against this criterion.

Table 9 Revised Retail Units, Locks Heath Local Centre

Retail (A1) units	19	44	
Acceptable Non-retail (A2) units	25		
Remaining Non – Retail units		11	

When viewed in the context of all the criteria set in the policy (table 9), it is clear that while there are more non-retail units in the local centre, the aims of the policy have been carried through.

4. Vacancy rates

The vacancy rates for the Borough's largest centres (as of summer 2014) are shown in table 10 below.

Table 10: Vacancy Rates

Centre	No. of vacant units	Percentage of vacant units	Percentage of vacant floorspace
Fareham (primary)	9	7.03 %	5.63%
Fareham (secondary)	23	10%	6.88%
Fareham (Town Centre)	32	9.12%	6.28%
Portchester	2	2.94 %	1.43%
Locks Heath	1	3.85%	1.49%
Park Gate	2	3.51%	1.88%
Stubbington	1	2.38%	1.43%

Across the Borough there has been an improvement in vacancy rates. This is an indicator of the improving retail market across the county and country as a whole.

Since summer last year, Fareham's Primary Shopping Area has seen a fall in vacant units by 7 units. The Secondary Shopping Area has maintained the number of vacant units; however, vacant floorspace has risen. Similar to previous years, the overall vacancy rate of units in Fareham Town Centre is the highest in the Borough but has fallen since summer 2013 by 1.99% (7 units). As in other centres, the majority of vacant units are smaller units. This is a continuation of national trends where national multipliers seek larger units that allow for more polarised activities responding to customer demands and changing shopping patterns. There is also an increasing number of occupiers (in particular within Fareham Shopping Centre) that benefit from temporary free lets during a period when units are unoccupied, such as Barnardo’s, Girlguiding and Alzheimer’s Society. For the purpose of this report, these units were classed as occupied.

When compared with the national average, it is clear that Fareham’s Town Centre, District and Local centres still perform strongly (figure 2).

4.1.2 Vacancy Rates over Time (% of overall units)

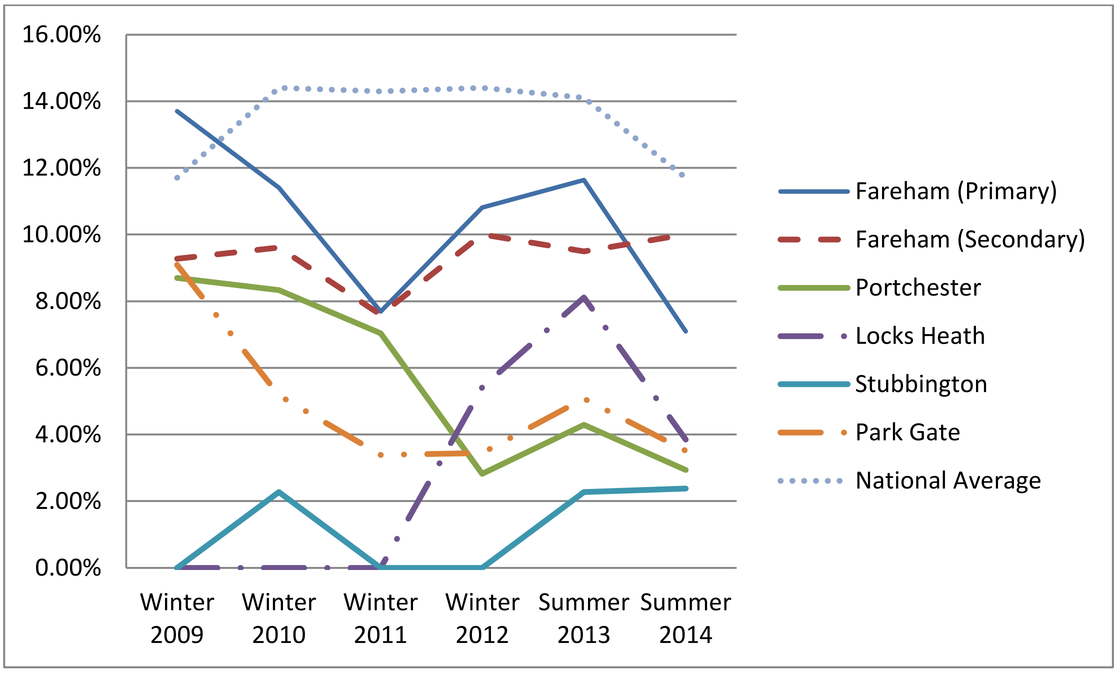


Figure 2: Vacancy Rates Over Time

5. Pedestrian Flows

5.1 Summer 2014 Counts

Footfall counts were taken at 11 locations throughout Fareham Town Centre to ascertain the busiest parts of the town, and how levels of pedestrian traffic dropped away outside of the Primary Shopping Area. The footfall counts were taken between 10:00 AM and midday on Friday 18th July, Saturday 19th July and Monday 21th July. The reason for undertaking counts on three different days of the week was to ascertain the effect of Fareham's weekly market (held every Monday) on the amount of pedestrians in the Town Centre, and also how many more pedestrians visited the Centre on a Saturday, traditionally the busiest day, the 11 locations are shown on the map below (figure 3). These were chosen as they represent the major entry and exit points in and out of the Primary Shopping Area (3, 4, 5, 6 & 7) as well as points along High Street (9), East Street (8) and West Street (1 & 2) and entry points to the Secondary Shopping Area. In winter 2011, a new location at Quay Street, leading to the new Tesco store (shown as 10), was added and Hartland’s Road, leading to Fareham Bus Station (shown as 11), was added in winter 2012.

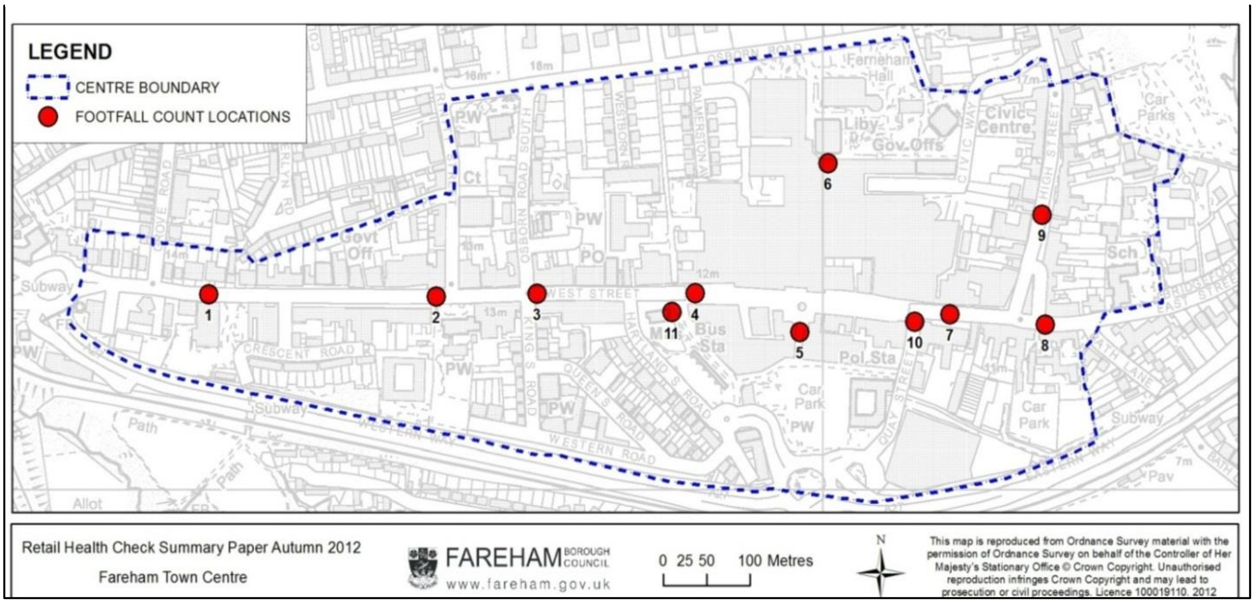


Figure 3: Footfall Count Locations

5.1.1 Pedestrian Footfall Counts Results

Table 11: Footfall Count per hour (Friday 18th July 2014)

Location	Footfall Count per hour (Friday 18th July 2014)	
1	East: 102	West: 72
2	East: 294	West: 198
3	East: 336	West: 276
4	East: 1086	West: 1014
5	North: 546	South: 450
6	North: 522	South: 714
7	East: 138	West: 216
8	East: 72	West: 72
9	North: 54	South: 54
10	North: 144	South: 228
11	North: 372	South: 330

Table 11: Footfall Count per hour (Saturday 19th July 2014)

Location	Footfall Count per hour (Saturday 19th July 2014)	
1	East: 276	West: 156
2	East: 312	West: 276
3	East: 492	West: 864
4	East: 1656	West: 2004
5	North: 1116	South: 1008
6	North: 828	South: 1140
7	East: 492	West: 264
8	East: 120	West: 72
9	North: 144	South: 156
10	North: 504	South: 216
11	North: 228	South: 312

Table 12: Footfall Count per hour (Monday 21st July 2014)

Location	Footfall Count per hour (Monday 21th July 2014)	
1	East: 174	West: 126
2	East: 348	West: 264
3	East: 612	West: 588
4	East: 1290	West: 1104
5	North: 738	South: 612
6	North: 960	South: 534
7	East: 258	West: 300
8	East: 54	West: 54
9	North: 54	South: 60
10	North: 366	South: 222
11	North: 438	South: 402

Tables 11, 12, and 13 above reinforce the position of the Primary Shopping Area with the highest foot traffic being recorded in locations 4, 5 and 6. The tables also show that, in the daytime at least, more people enter the Primary Shopping Area from the west (4) and the north (6) than any other route. This is perhaps unsurprising, given that location 4 includes all those who travel by bus, and location 6 includes all those who park in the multi-storey car park. Location 5 includes all those who park in Market Quay car park, and as such shows a relatively high amount of pedestrian traffic. It would probably represent a higher proportion of total traffic if a count was done in the evening, when the Reel Cinema and Nando's restaurant attract more visitors and the Market Quay car park becomes free.

As in previous years, the counts fell at locations further away from the Centre, with steady decreases seen along West Street, and limited counts along High Street and East Street, possibly due to the lack of car parking in these areas.

For the purpose of this exercise, the total numbers recorded in the new locations mentioned above have been deducted when comparing with total numbers recorded in previous years. These numbers will be compared in future years, when more data is collected to allow for more statistically significant analysis. Numbers recorded in Quay Street are compared with numbers recorded in previous years.

As in previous years, the highest amount of pedestrian traffic was recorded on Saturday (12,636 pedestrians), which, this year also happened to be a market day. The total recorded on Saturday was 32.2% higher than on Monday (Monday market day) and 73.3% higher than on Friday this year. When compared with the previous footfall count taken in winter 2013, the numbers recorded on Saturday this year were higher by 13.5%, numbers recorded on Monday were higher by 6.3% and numbers recorded on Friday were lower by 12.3% compared to this time last year.

With regard to the locations added recently, at Quay Street leading to the new Tesco store and at Hartland's Road leading to Fareham Bus Station, the busiest location this year was Hartland's Road on Friday. More in-depth analysis of these new locations will be possible in future years when more data will be collected. The current data held on these new nodes does show some changes brought about by development, in particular the new Tesco store. Below is a graph showing the uplift in the footfall counts recorded at Quay Street (Location 10) before and after the opening of the store (figure 4).

5.1.2 Quay Street (Location 10) Footfall Time Series

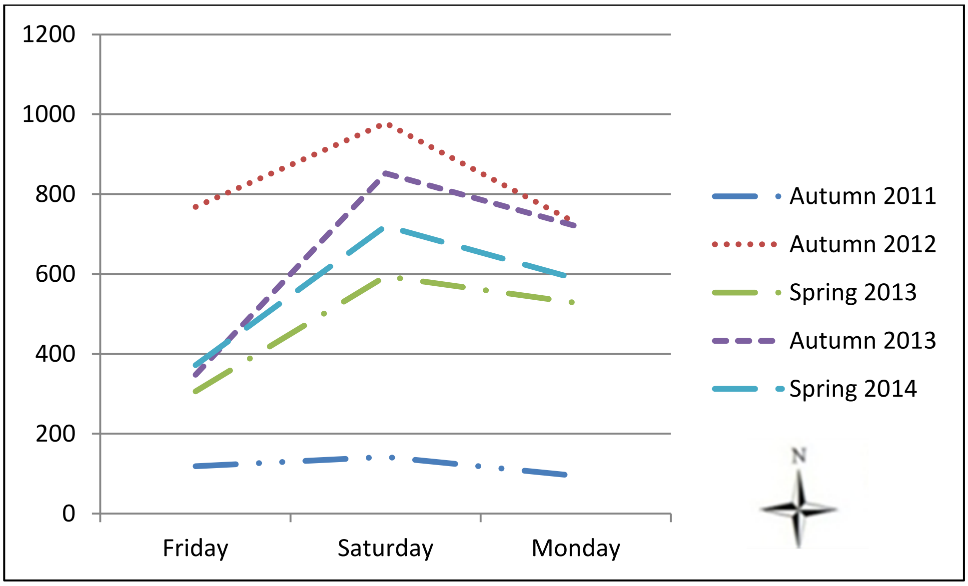


Figure 4: Quay Street Footfall Time Series

As stated in the Winter RHC, year on year there was an uplift of 594.94% from autumn 2011 to autumn 2012. While the winter count showed a fall of 22.39% on the previous winter, the summer count shows an uplift of 11.36% on the summer 2013 figures. As evidenced by the graph above (figure 4) and the map showing footfall count locations (figure 3), the highest footfall was to the north away from the Tesco Store. The presence of an undercroft car park within the confines of the supermarket would go some way in explaining the higher flow of pedestrians towards the town centre.

5.2 Pedestrian Counts over Time

Figure 5 below shows how the total number of pedestrians visiting Fareham Town Centre on the different days, has changed over time. As shown 4in figure 5, the number of pedestrians recorded this year, has fallen slightly from winter 2013. Footfall counts for Monday were at their second lowest since the beginning of the survey in 2009. Despite this, the pedestrian count for Monday Summer 2014 (9,984 persons) is only 589 persons under the average Monday count of 10,573 persons for the length of the survey period. The counts recorded on Friday were also similar to those recorded historically, however, they are still lower than last year (Winter 2013). Saturday counts have historically been higher than counts taken on Mondays and Fridays over previous years (except for Winter 2012). The footfall counts will become more useful in future years when more counts are undertaken, lengthening the time series data.

5.2.1 Times Series for Pedestrian Counts

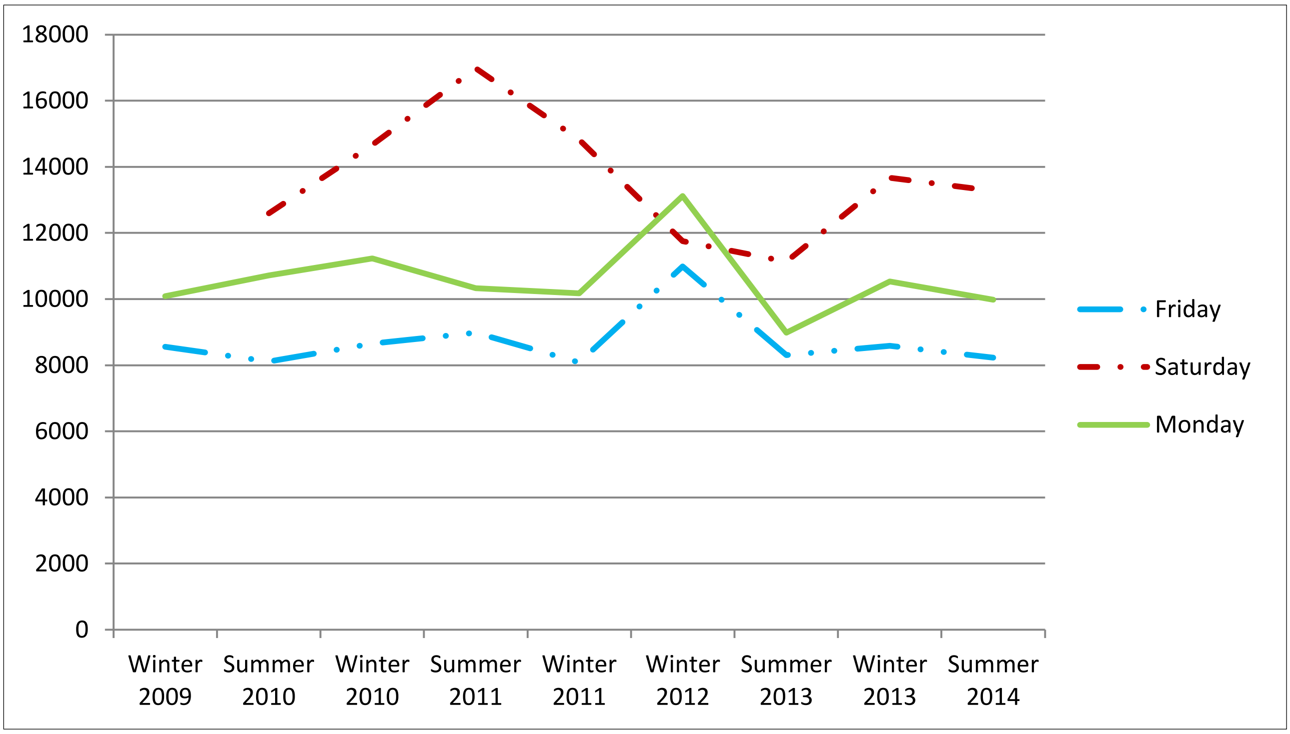


Figure 5: Time Series for Pedestrian Counts

Numerous variables are likely to influence the outcomes of the footfall surveys. The weather for example can influence a person's decision whether to venture into the town centre or to stay at home or head elsewhere; in addition, whether there is a special event occurring within the town centre (such as a farmers market) on the day of the surveys, will also influence the number of people being counted. A rational to the findings in figure 5 is provided below.

It is important to note that the count on Saturday 24th October 2010 (Winter 2010 in figure 5 above) coincided with an event being held in the Town Centre which may have influenced these figures. The Monday count for winter 2010 also coincided with the school half term which may also have had some influence. The Saturday count for winter 2012 was made during severe weather conditions which may explain the sudden drop in numbers recorded. The count for winter 2013 was conducted in undesirable weather conditions which may explain the reduction in overall footfall counts across the three days. This summer's footfall counts show a slight drop when compared to the winter 2013 counts and this is most likely due to the additional footfall that the festive period brings. It is however still higher in overall footfall compared to the same time last year.

6. Amount of Retail, Leisure & Office Floorspace in "Out of Town" and "Edge of Centre" Locations

6.1 Office Floorspace

Fareham has a considerable amount of office floorspace in out of centre locations (approx. 174,216sq.m) (as at Summer 2013). The majority of this floorspace is located as part of wider employment sites, which usually benefits from good transport links, prominent or semi-prominent locations and relatively cheap land values. The major employment areas of Segensworth (East & West, including Office of National Statistics), Newgate Lane and Broadcut/Fareham Industrial Park all house varying levels of office floorspace. Other office development is clustered around key road networks in order to be as accessible as possible for workers commuting by car. In Fareham this is shown along Wickham Road, at Furzehall Farm, Parkway and the Potteries.

Other sites have less generic reasons for being in out of centre locations, for example Cams Hall is a large area of office development that re-used a country house, and associated out buildings to provide a high quality business park based mainly on the high capacity fibre optic broadband link. Another unique example is the single largest provider of "out of town" office floorspace, the National Air Traffic Services building, which is located away from the larger urban areas in the Borough partly for security reasons.

List of office floorspace in out of centre locations

Table 13: List of Office Floorspace in out of Centre Locations.

Site	Location	Floorspace
The Gardens, Broadcut	Edge of centre	2,395sq.m
Quayside, Lower Quay	Edge of centre	987sq.m
North of Park Gate, Botley Road	Edge of centre	3,198sq.m
Waterside House, Waterside Gardens	Edge of centre	3,796sq.m
Fareham Heights, Standard Way	Out of centre	5,420sq.m
Parkway, Wickham Road	Out of centre	5,790sq.m
Furzehall Farm, Wickham Road	Out of centre	5,618sq.m
The Potteries, Wickham Road	Out of centre	2,060sq.m
Office for National Statistics	Out of centre	17,997sq.m
Segensworth East	Out of centre	21,642sq.m
Segensworth West	Out of centre	13,728sq.m
Enterprise Centre, Newgate Lane	Out of centre	1,290sq.m
Funtley Court, Funtley Hill	Out of centre	2,334sq.m
Brook Avenue/Brook Lane	Out of centre	1,632sq.m
Delta Business Park, Salterns Lane	Out of centre	2,276sq.m
Barnbrook Systems, Fareham Park Road	Out of centre	956sq.m
Oslands Court, Bridge Road	Out of centre	368sq.m
Kites Croft, Warsash Road	Out of town	4,044sq.m
National Air Traffic Services	Out of town	59,625sq.m
Cams Estate, Cams Hill	Out of town	18,952sq.m
316 Botley Road	Out of town	468sq.m
TOTAL		**174,216sq.m**

6.2 Permitted Changes of Use

From 2013 a series of new permitted development rights were passed by the government allowing effective change of use class of B1 (a) office use, A1 shops and A2 professional and financial services to C3 residential without requiring the planning consent of the local authority. This new change to permitted development came into effect on 30th May 2013, since that date there have been a number of changes in use class within Fareham Borough these are highlighted in table 15 below.

Table 14: Changes in Use Class from B1 Office Space

Site Address	Proposal	Estimated Floorspace Loss m^2
2 Old Manor Cottages, Wickham Road, Fareham.	Change of use of first floor offices to residential use (class C3)	16.94
219 West Street, Fareham	Change of use from B1(a) to Residential Use (Class C3)	69.14
Fareham Point, Wickham Road, Fareham	Change of use of offices to form 18 two Bedroom Apartments	2,932
39 Botley Road, Park Gate	Change of use of ground floor from b1(a) to residential use (class c3) to four flats	49
8 Southampton Hill Titchfield	prior approval of a proposed change of use from office (b1) to 9 nos. 2 bed flats (c3)	139
10 Southampton Hill Titchfield	conversion of building to provide three 1 bed and two 2 bed flats	164
31 Newtown Road Warsash	change of use from (a1) retail to c3 (residential)	**28**
5 Brook Lane Warsash	change of use from a1 to d2 (exercise studio)	**151**
44 High Street Fareham	conversion of building from class b1 to c3	**746.2**
TOTAL		**1517.94**

As table 15 above demonstrates there has been an estimated loss of B1(a) employment space of 592sq.m since May 30th 2013 changes. Subsequent Retail Health Checks will provide evidence to assess whether these losses of employment floorspace are going to be an ever increasing trend.

6.3 Retail Floorspace

Fareham has three "out of centre" retail areas not including parades and local shops. These are typified by large retail sheds or supermarkets adjacent to the major road network and accompanied by large levels of car parking. The largest of these areas in Fareham is the Speedfield Park/Collingwood Retail Park area on Newgate Lane which takes advantage of the busy main route between Gosport/Stubbington/Lee on Solent and Fareham.

List of retail floorspace in out of centre locations

Table 15: Retail Floorspace in out of Centre Locations

Site	Existing Stores	Floorspace
Newgate Lane	ASDA, Homebase, Elliots, Wickes, B&M, Topps Tiles, Lidl, Blockbuster, Pets at Home, Carpets 4 Less	28,886sq.m
Southampton Road	Argos, B&Q, Comet, Halfords, Currys, Carpetright, Smyths Superstore, Pets at Home, Benson for beds, CarpetBarn, Dunelm Mill	22,724sq.m
Broadcut	Sainsbury's, Dream Beds, Staples	7,261sq.m
TOTAL		**58,871sq.m**

Besides the limited expansion of Sainsbury's, Broadcut and some internal mezzanine floors at Halfords and Comet, Southampton Road and ASDA (Newgate Lane), no large scale retail floorspace has been permitted out of centres in recent years, which reflects the change in national policy to ensure development is focused in centres. However there was a net additional gain in retail floorspace through a mezzanine extension by Smyths Superstore.

6.4 Leisure Floorspace

Fareham has a reasonable amount of leisure floorspace located in out of centre locations mostly in the form of gym's and indoor sports facilities that require more space than is generally available in average centre units. The majority of the out of centre leisure floorspace is therefore located in industrial parks with lower land values, such as Soccer City, Broadcut and Fareham Snooker Club in Broadcut. However, the Borough's only cinema is within the main town centre, along with the Borough's only theatre, Ferneham Hall.

Table 16: Leisure floorspace.

Site	Activities	Floorspace
Go Bowling, Collingwood Retail Park	Ten pin bowling	2,297sq.m
Soccer City, Fareham Industrial Park	Indoor football	550sq.m
Fareham Snooker Club, Broadcut	Snooker	519sq.m
Fareham Leisure Centre, Park Lane	Swimming pool, gym, indoor sports hall	4,946sq.m
Crofton Community Centre, Stubbington Lane	Indoor sports hall	2,485sq.m
Palmerston Indoor Bowls, Palmerston Business Park	Indoor Bowls	2,542sq.m
24/7 Fitness, Down End Road	Gym	1,086sq.m
Abshot Country Club	Swimming pool and gym	919sq.m
Cams Hall Estate Golf Club	Golf club	714sq.m
TOTAL		**16,058sq.m**

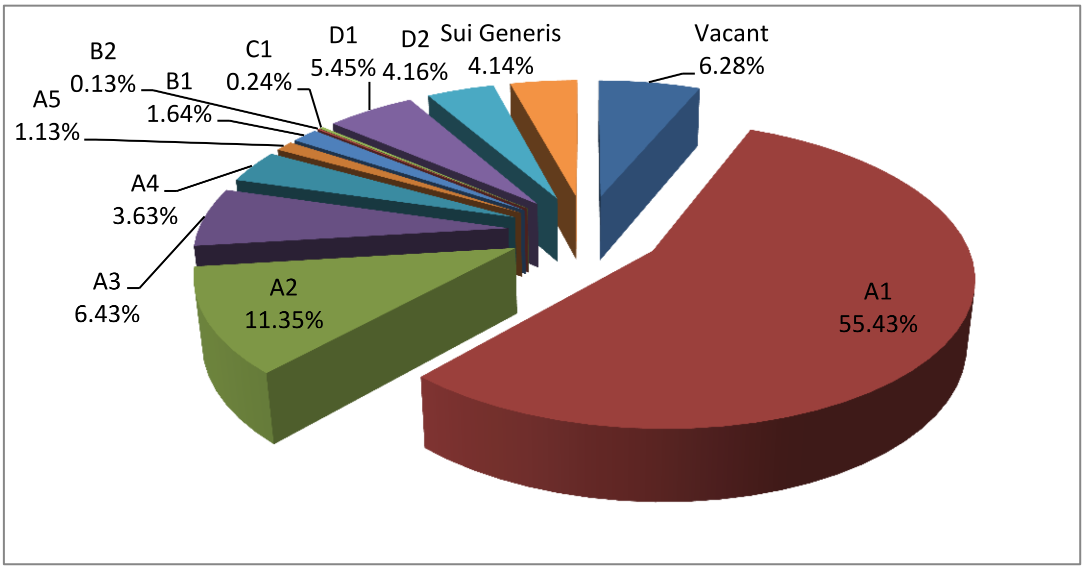
7. Appendices

Appendix A - Fareham Town Centre Data Sheets

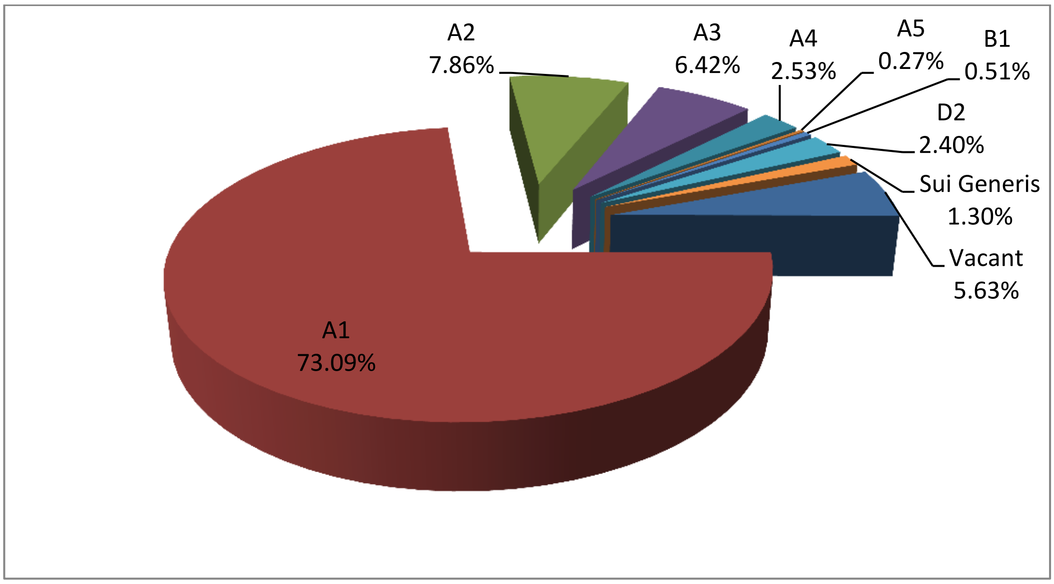
Fareham Town Centre Ground Floor Units (overall)

	Number of units	Change	% of total units
Total	351	0	
Vacant	32	-7	9.12
			% of occupied units
USE CLASSES			
A1	161	6	50.47
A2	58	-1	18.18
A3	30	1	9.40
A4	10	2	3.13
A5	10	1	3.13
B1	10	3	3.13
B2	1	0	0.31
C1	1	0	0.31
D1	15	1	4.70
D2	6	-1	1.88
Sui Generis	17	-5	5.33
RETAIL GROUP			
Automotive	4	-1	1.25
Clothing	31	2	9.72
Convenience	13	0	4.08
Eating Out	49	3	15.36
Home & Electronics	25	0	7.84
Mixed Retail	36	2	11.29
Other	15	2	4.70
Recreation	26	0	8.15
Services	73	1	22.88
Wellness	47	-2	14.73

Distribution of Use Class as % of Floorspace



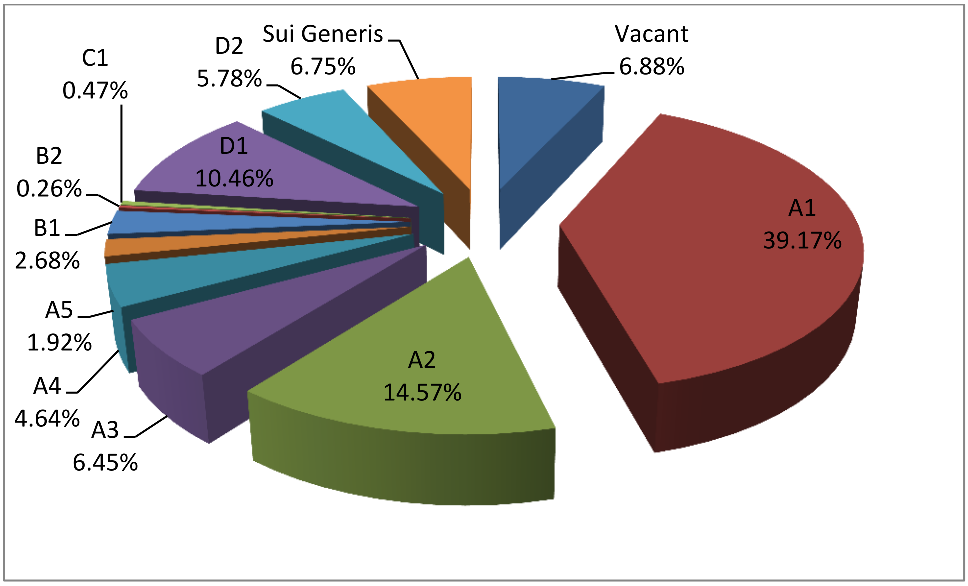
Distribution of Use Class as % of Total Floorspace



Fareham Town Centre (Secondary Shopping Area)

	Number of units	Change	% of total units
Total	223	-8	
Vacant	23	0	10.31
			% of occupied units
USE CLASSES			
A1	80	8	40.00
A2	45	-1	22.50
A3	18	1	9.00
A4	6	1	3.00
A5	9	1	4.50
B1	8	1	4.00
B2	1	0	0.50
C1	1	0	0.50
D1	15	2	7.50
D2	5	-1	2.50
Sui Generis	12	-4	6.00
RETAIL GROUP			
Automotive	4	-1	2.00
Clothing	11	4	5.50
Convenience	9	1	4.50
Eating Out	32	2	16.00
Home & Electronics	13	-1	65.50
Mixed Retail	14	3	7.00
Other	12	2	6.00
Recreation	16	-1	8.00
Services	56	0	28.00
Wellness	33	0	16.50

Distribution of Use Class as % of Total Floorspace



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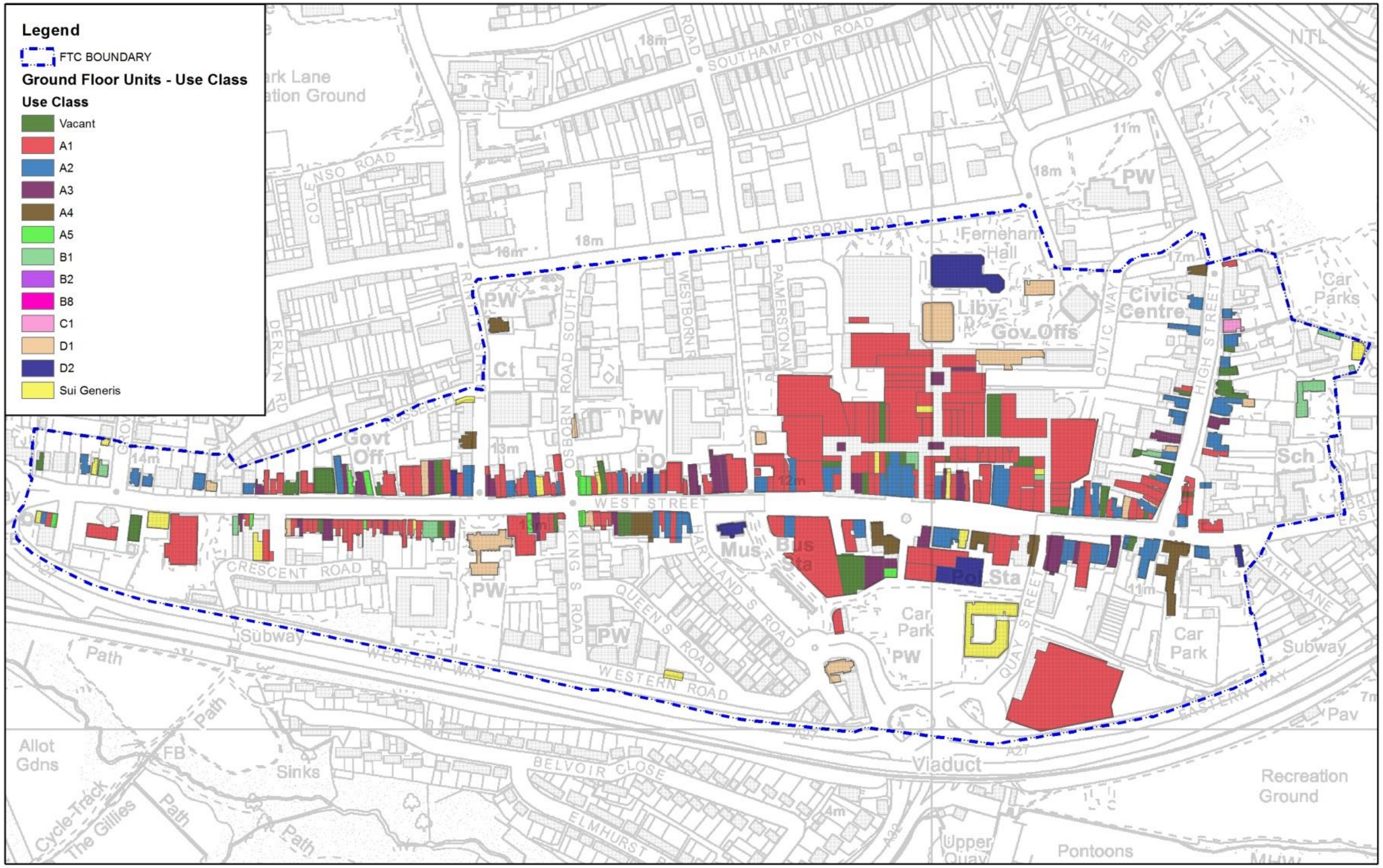
Map of retail groups across Fareham Town Centre



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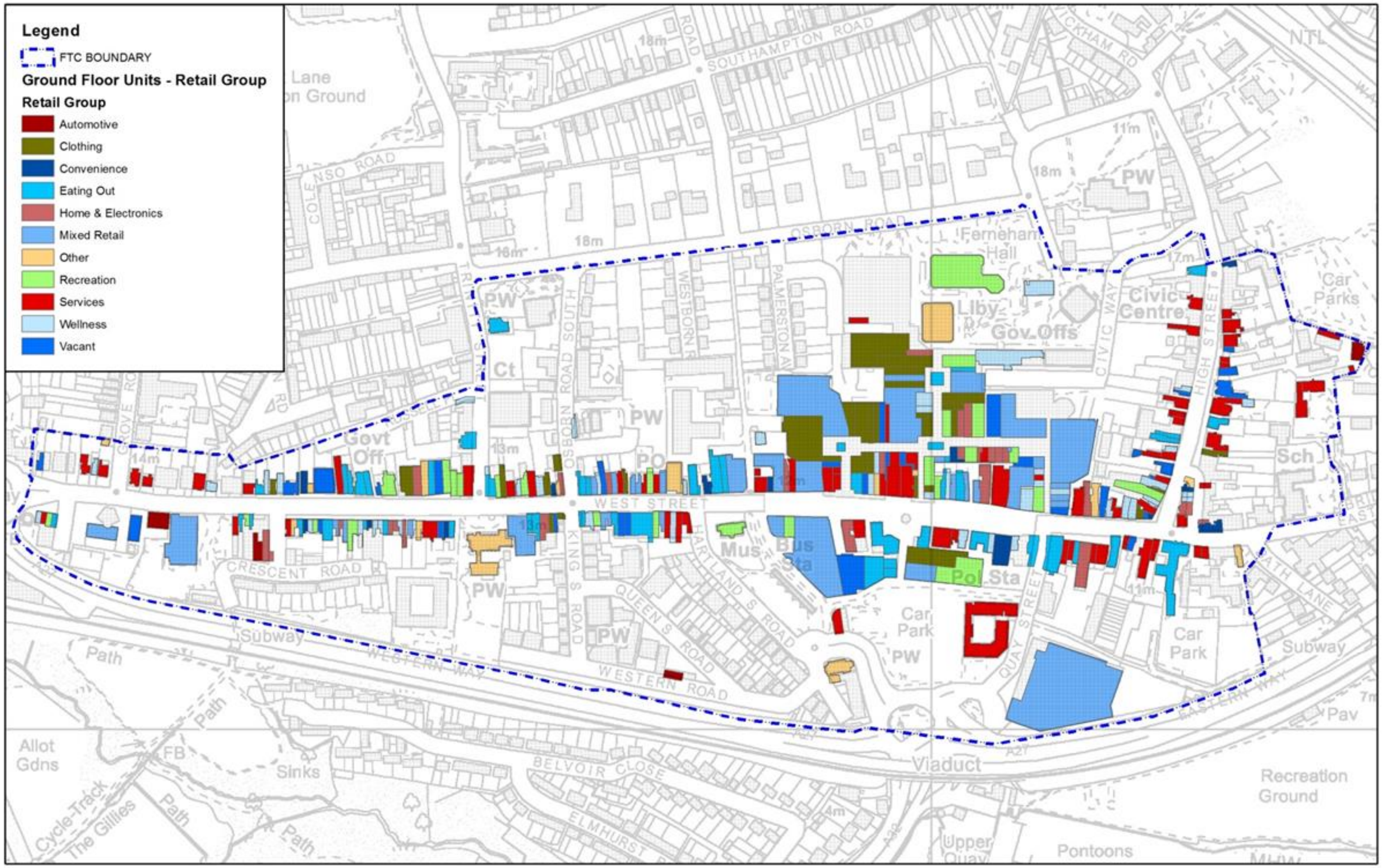
Fareham Town Centre

FAREHAM
BOROUGH COUNCIL

Map of use classes across Fareham Town Centre



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Fareham Town Centre

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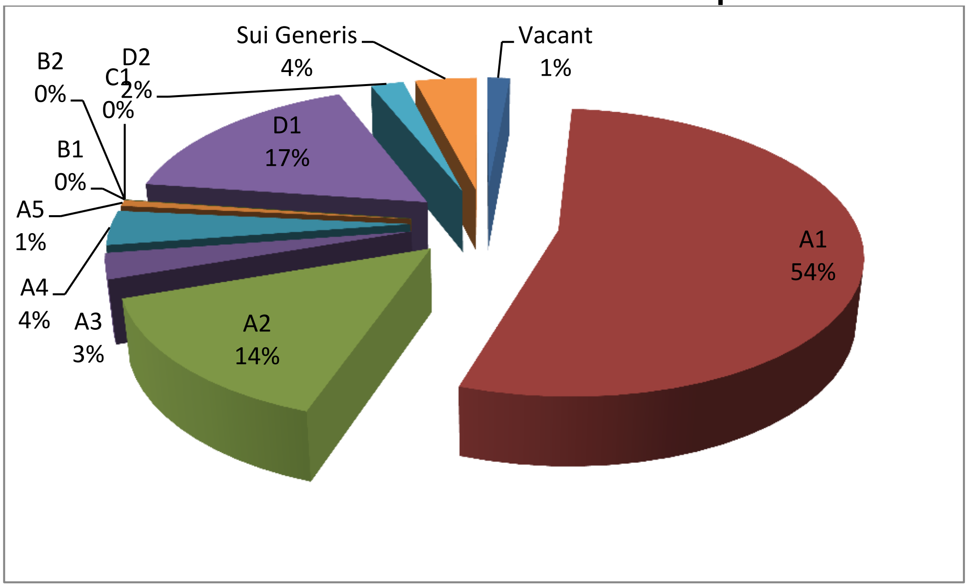
BOROUGH COUNCIL

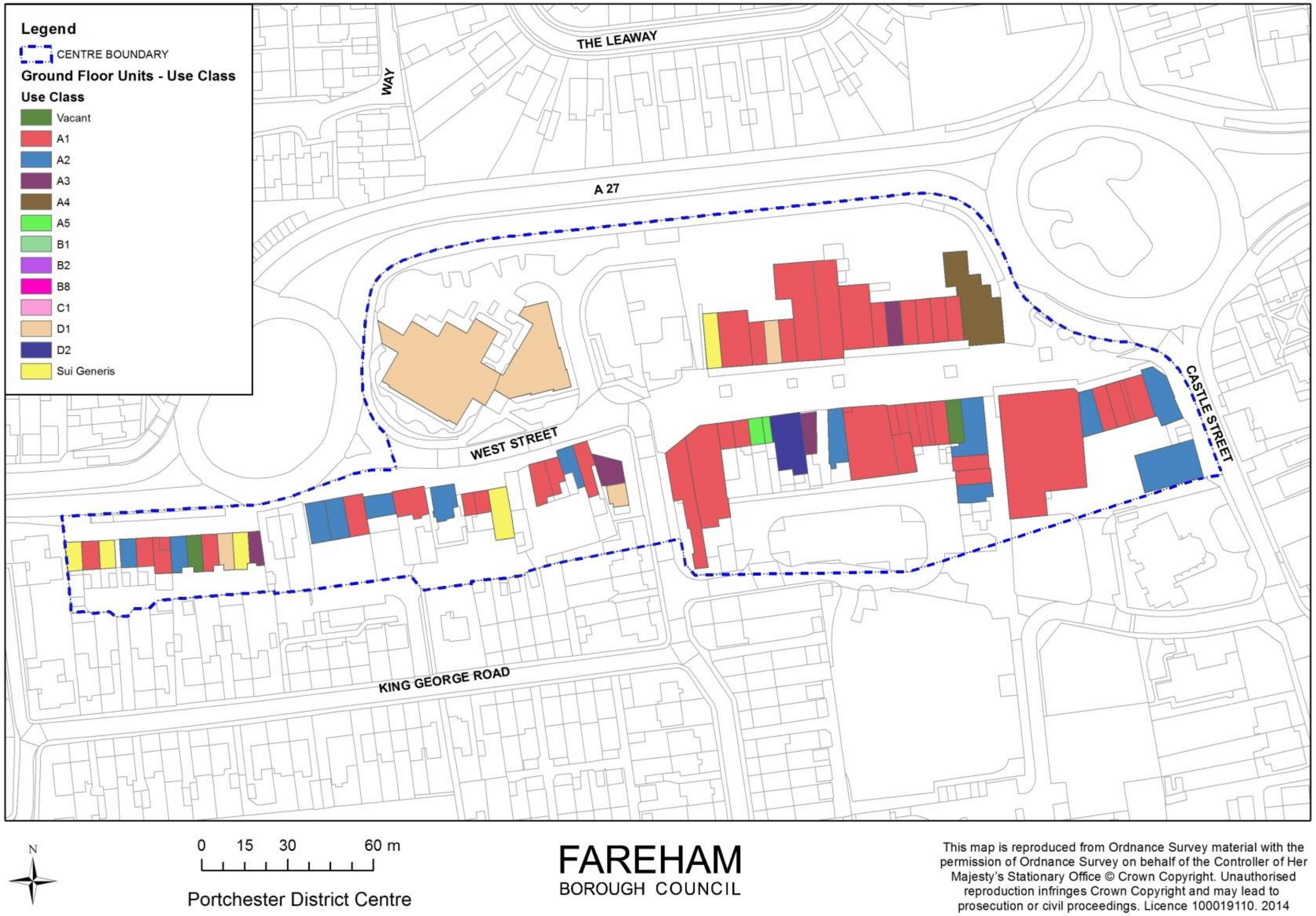
Appendix B Portchester District Centre Data Sheets

	Number of units	Change	% of total units
Total	**68**	**0**	
Vacant	**2**	**0**	**2.94**
			% of occupied units
USE CLASSES			
A1	**35**	**-1**	**53.03**
A2	**13**	**0**	**19.7**
A3	**4**	**0**	**6.06**
A4	**1**	**0**	**1.52**
A5	**2**	**0**	**3.03**
B1	**0**	**0**	**0**
B2	**0**	**0**	**0**
C1	**0**	**0**	**0**
D1	**5**	**0**	**7.58**
D2	**1**	**1**	**1.52**
Sui Generis	**5**	**1**	**7.58**
RETAIL GROUP			
Automotive	**1**	**0**	**1.52**
Clothing	**1**	**0**	**1.52**
Convenience	**5**	**0**	**7.58**
Eating Out	**7**	**-2**	**10.61**
Home & Electronics	**5**	**0**	**7.58**
Mixed Retail	**9**	**0**	**13.64**
Other	**5**	**0**	**7.58**
Recreation	**7**	**1**	**10.61**
Services	**15**	**1**	**22.73**
Wellness	**11**	**0**	**16.67**

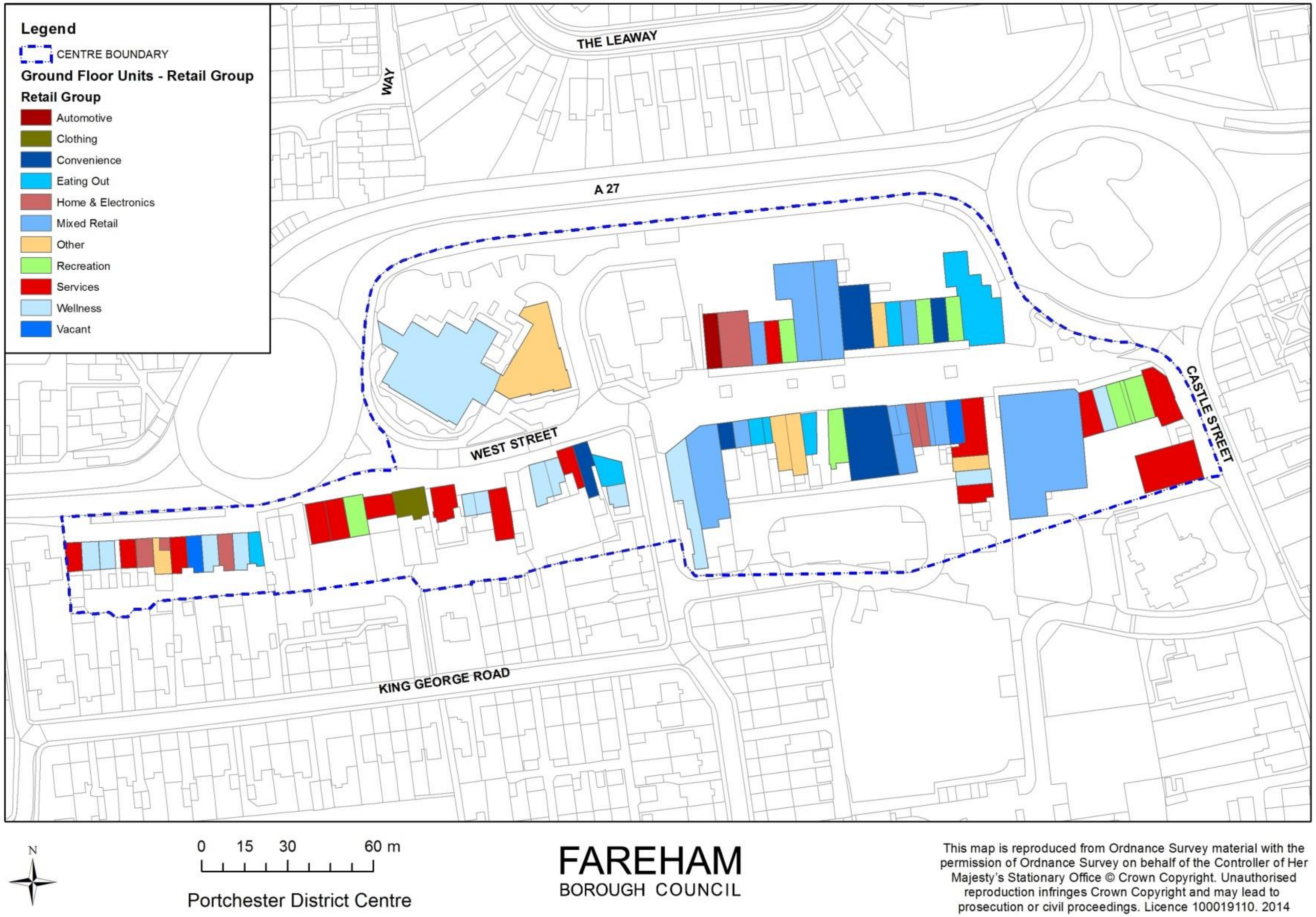
Distribution of Use Class as % of Total Floorspace



Map of use classes across Portchester District Centre



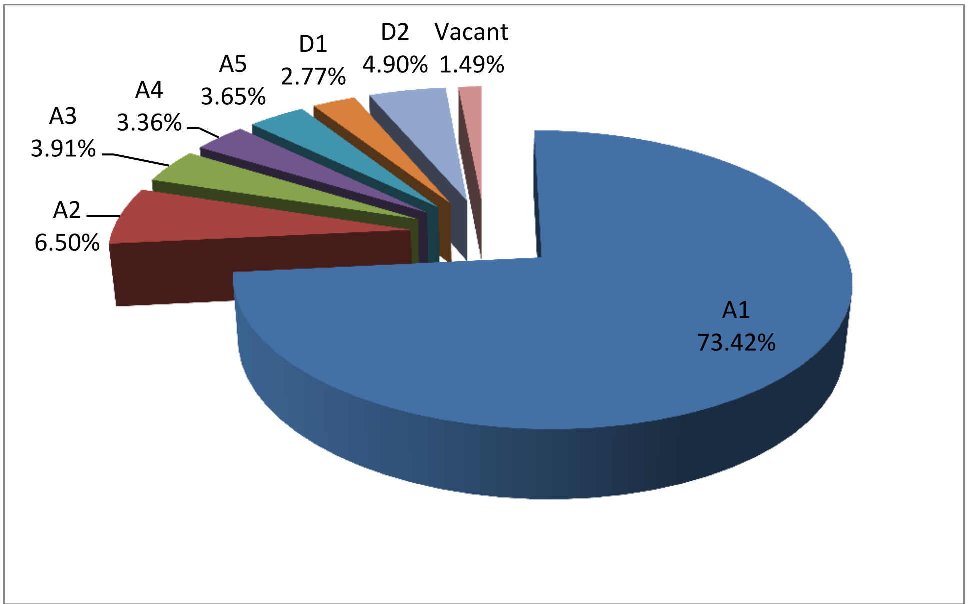
Map of retail groups across Portchester District Centre



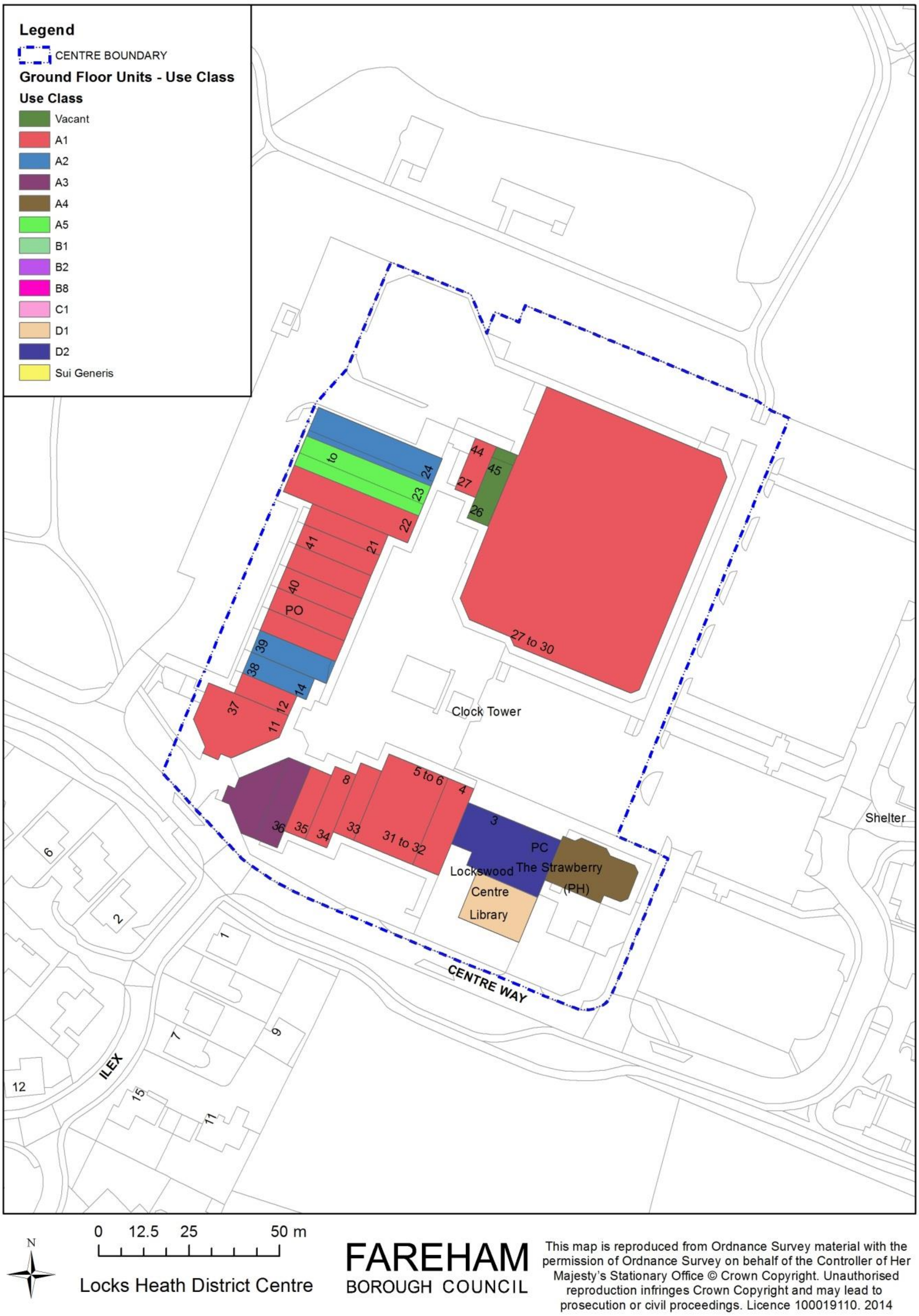
Appendix C Locks Heath District Centre Data Sheets

	Number of units	Change	% of total units
Total	26	0	
Vacant	1	1	4.00
			% of occupied units
USE CLASSES			
A1	16	-2	66.67
A2	3	0	12.5
A3	2	0	8.33
A4	0	-1	0
A5	1	1	4.17
B1	0	0	0
B2	0	0	0
C1	0	0	0
D1	1	0	4.17
D2	1	0	4.17
Sui Generis	0	-1	0
RETAIL GROUP			
Automotive	0	0	0
Clothing	0	-1	0
Convenience	7	1	28
Eating Out	4	1	16
Home & Electronics	0	0	0
Mixed Retail	2	0	8
Other	4	0	16
Recreation	1	0	4
Services	4	-1	16
Wellness	3	-1	12

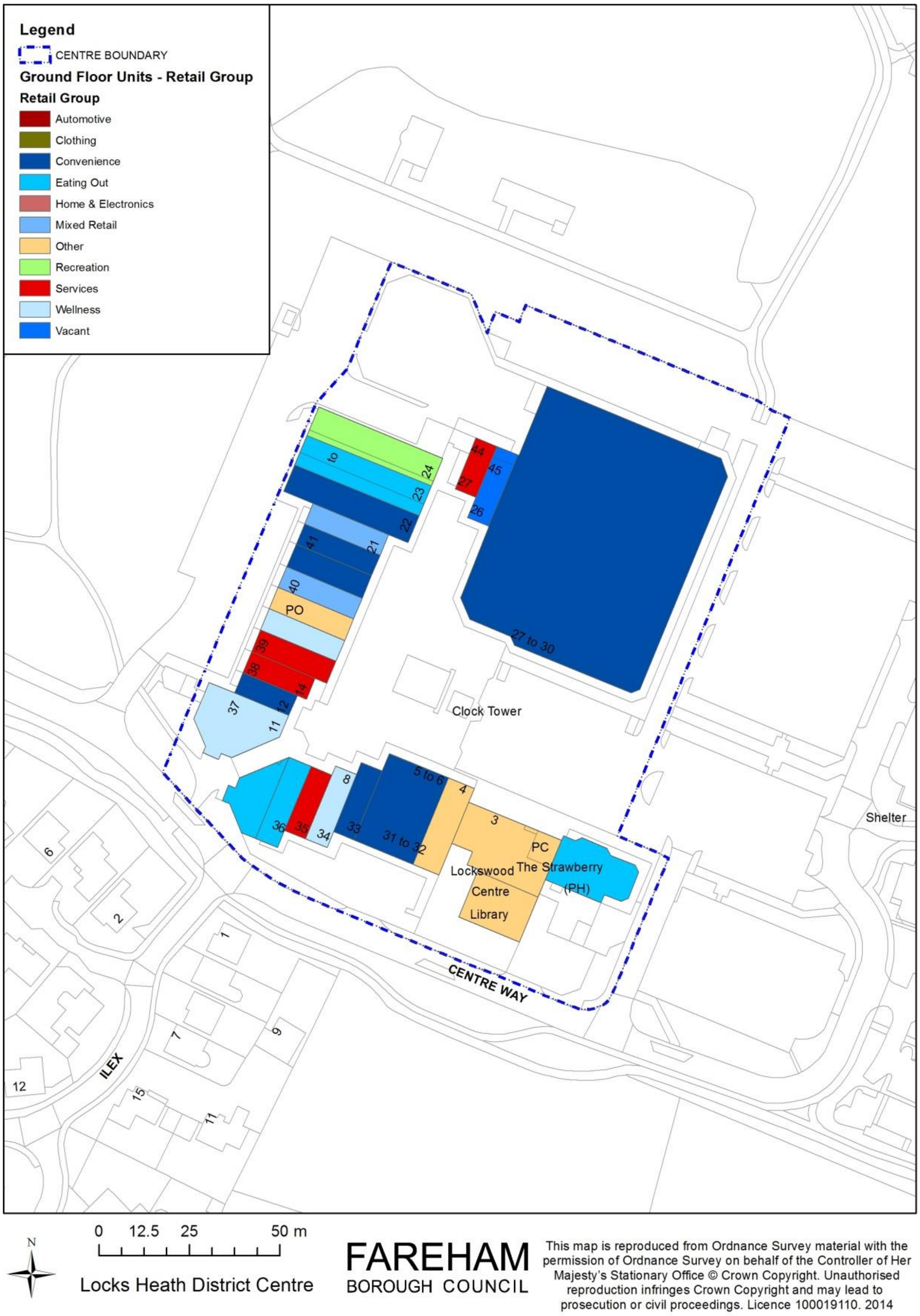
Distribution of Use Class as % of Total Floorspace



Map of Use classes across Locks Heath District Centre



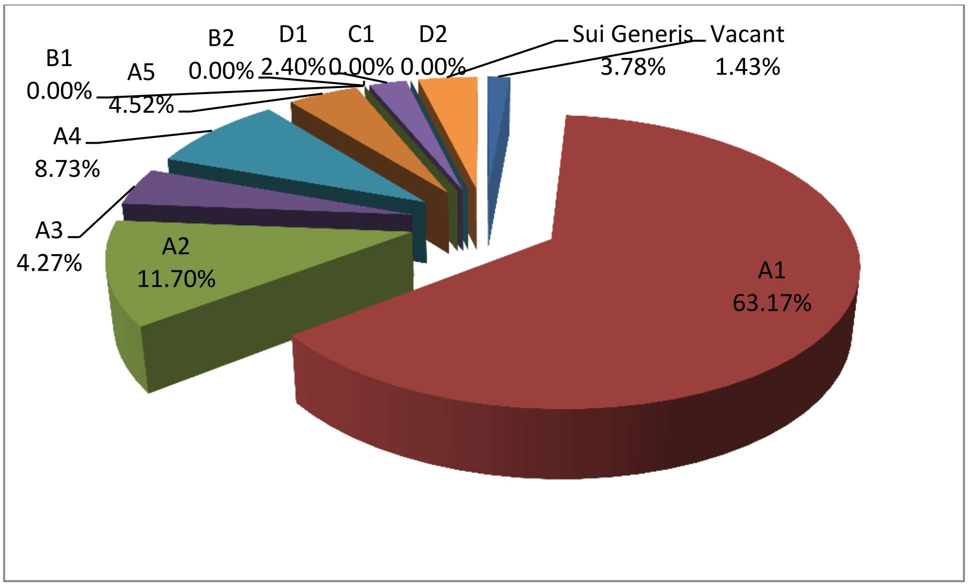
Map of retail groups across Locks Heath District Centre



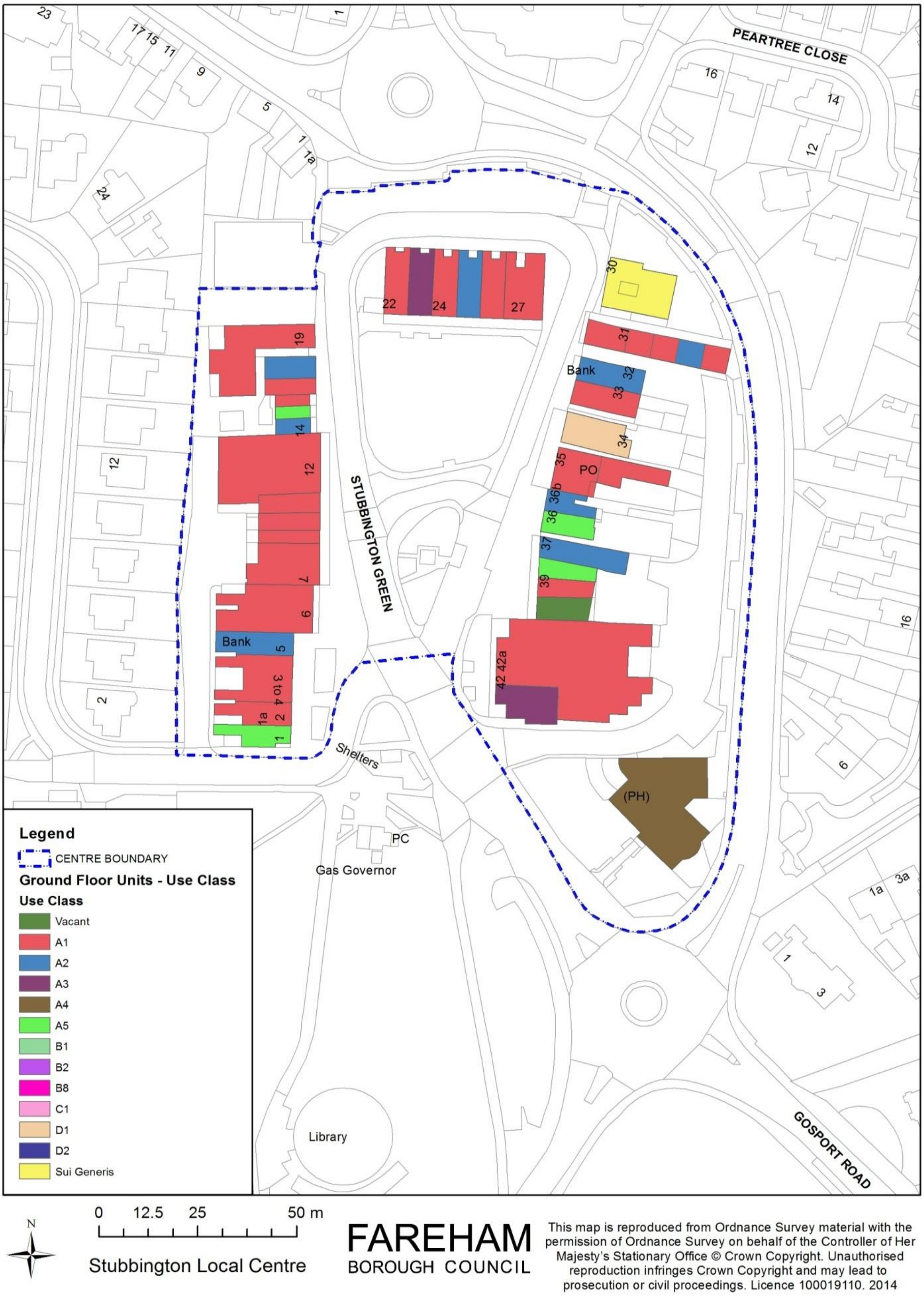
Appendix D Stubbington Local Centre Data Sheets

	Number of units	Change	% of total units
Total	42	1	
Vacant	1	0	2.38
			% of occupied units
USE CLASSES			
A1	24	-1	58.54
A2	8	0	19.51
A3	2	0	4.88
A4	1	0	2.44
A5	4	2	9.76
B1	0	0	0
B2	0	0	0
C1	0	0	0
D1	1	0	2.44
D2	0	0	0
Sui Generis	1	0	2.44
RETAIL GROUP			
Automotive	0	0	0
Clothing	2	0	4.88
Convenience	6	0	14.63
Eating Out	7	2	17.07
Home & Electronics	1	0	2.44
Mixed Retail	6	0	14.63
Other	4	0	9.76
Recreation	2	0	4.88
Services	8	-1	19.51
Wellness	5	0	12.2

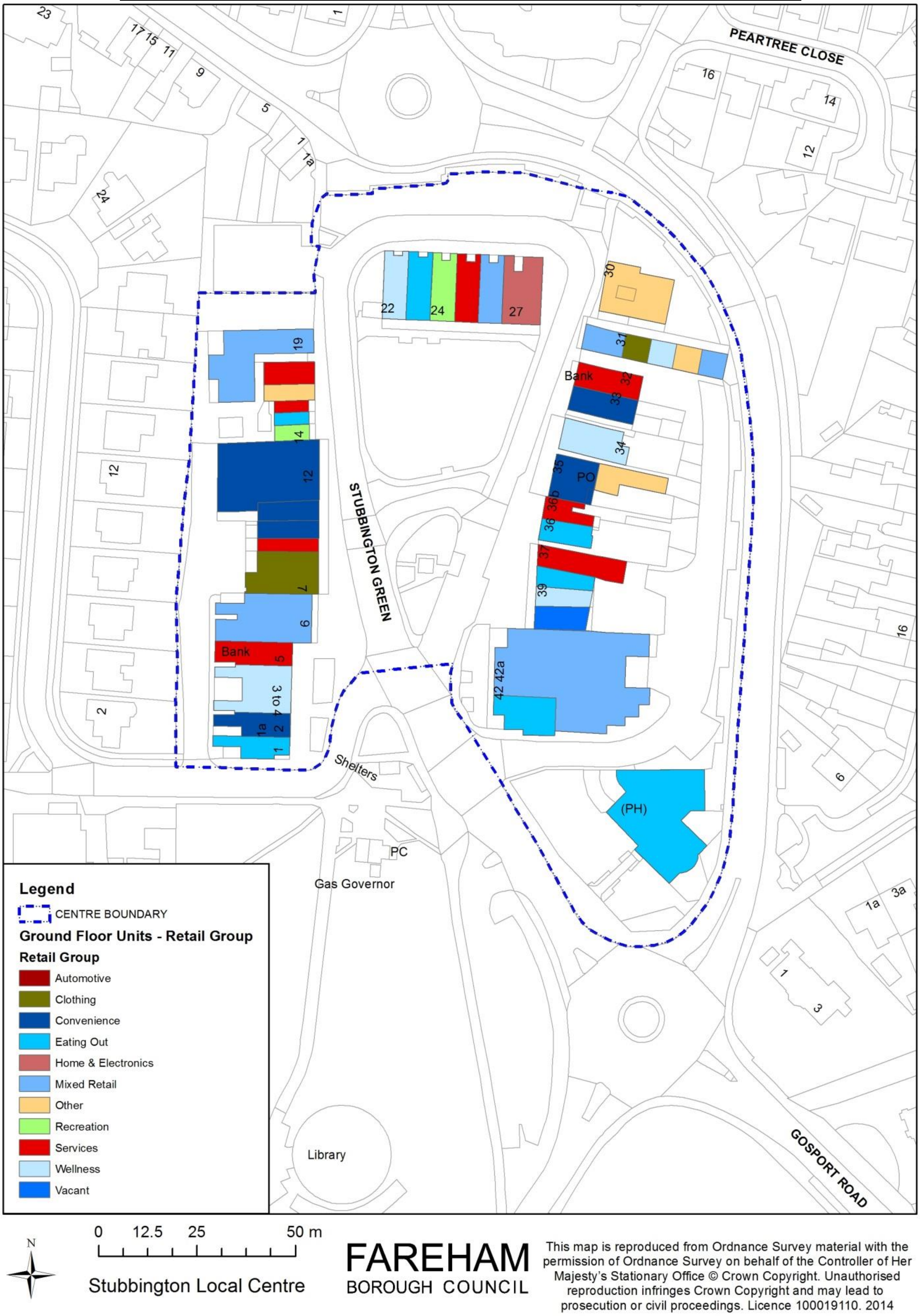
Distribution of Use Class as % of Total Floorspace



Map of retail groups across Stubbington Local Centre



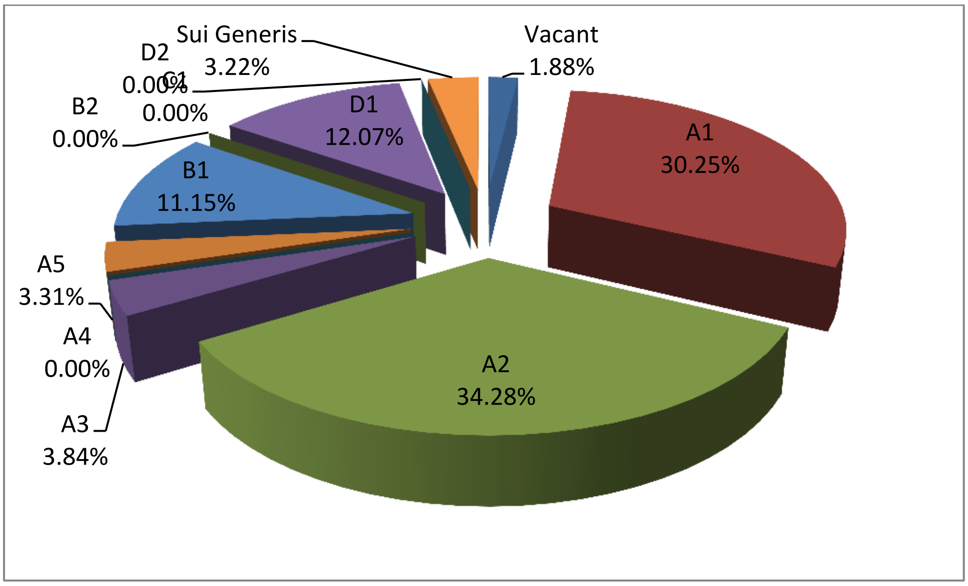
Map of retail groups across Stubbington Local Centre



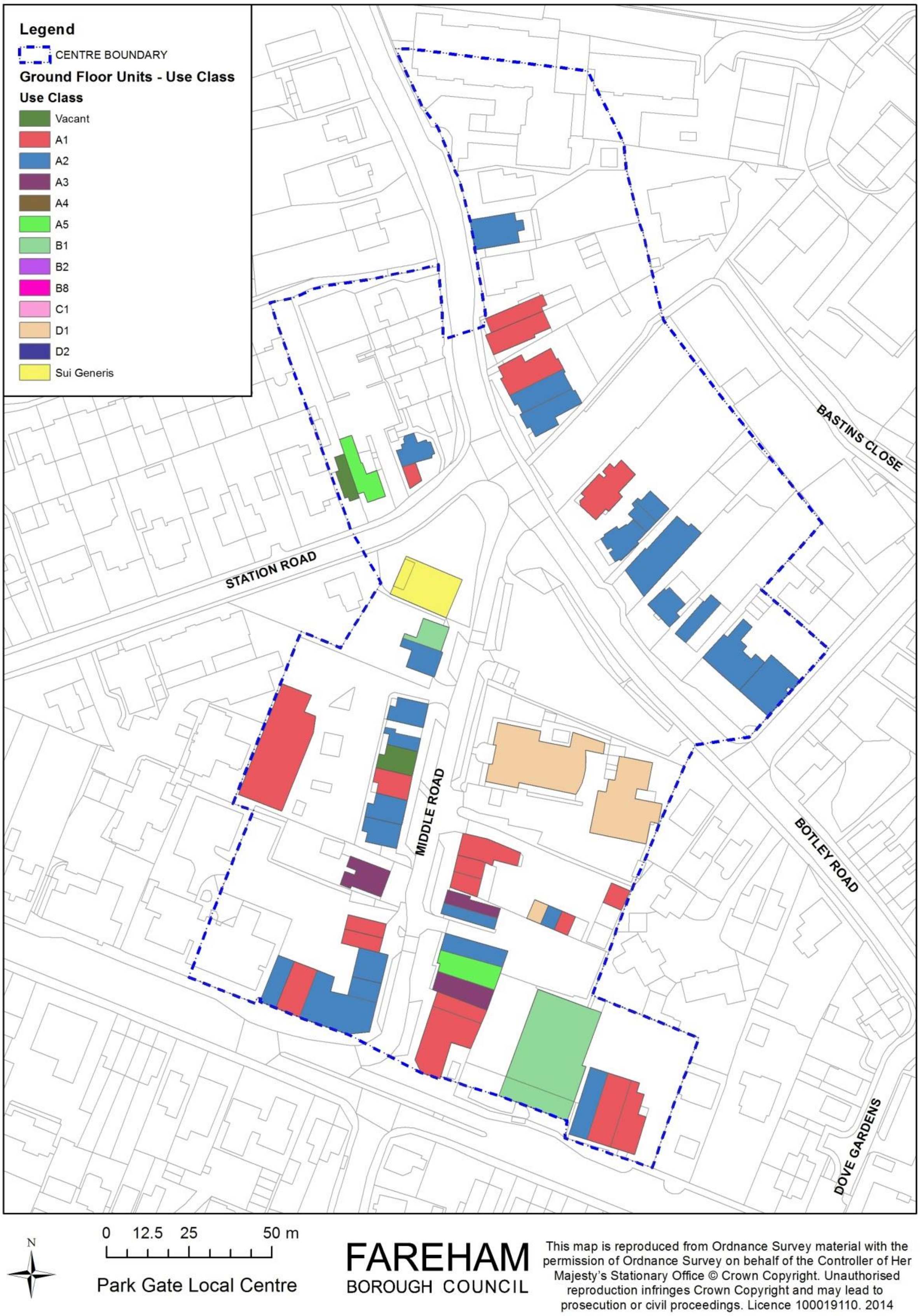
Appendix E Park Gate Local Centre Data Sheets

	Number of units	Change	% of total units
Total	57	0	
Vacant	2	-1	3.51
			% of occupied units
USE CLASSES			
A1	19	-2	34.55
A2	25	3	45.45
A3	3	0	5.45
A4	0	0	0
A5	2	1	3.64
B1	2	-1	3.64
B2	0	0	0
C1	0	0	0
D1	3	0	5.45
D2	0	0	0
Sui Generis	1	0	1.82
RETAIL GROUP			
Automotive	1	0	1.82
Clothing	1	-1	1.82
Convenience	1	-1	1.82
Eating Out	5	1	9.09
Home & Electronics	5	-1	9.09
Mixed Retail	0	0	0
Other	4	1	7.27
Recreation	4	0	7.27
Services	29	2	52.73
Wellness	5	0	9.09

Distribution of Use Class as % of Total Floorspace



Map of use classes across Park Gate Local Centre



Map of retail groups across Park Gate Local Centre