FAREHAM
BOROUGH COUNCIL

Fareham Borough Retail Health Check

Summary Paper 2015

1 Introduction

1.1 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

1.2 This Retail Health Check (RHC) provides a quantitative assessment overview of the retail health of the Borough‟s core retail centres based on footfall (Fareham Town Centre only); ground floor unit occupancy and performance against adopted local plan policies that relate to retail development. The paper also provides a year on year comparative analysis of the retail health of the Borough‟s core retail centres since 2009, when the first retail health check was undertaken by the Council.

1.3 The RHC plays an important part in informing the development of the Local Plan through the monitoring of the Borough‟s core retail centres. The information is also used to help inform development management decisions on planning applications and can be used to inform town centre management. The RHC is not however intended to be viewed as a retail study.

2 Planning Policy Context

NATIONAL POLICY

2.1 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 defined and monitored either as part of the retail health check or through other evidence studies.

Table 1: Planning Practice Guidance Retail Key Performance Indicators

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.

KPI	Definition/Function	Timescale	Method of Data Collection
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.

2.2 The majority of the KPIs were already monitored through the RHC, prior to the publication of the PPG in March 2014, with exception only 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 a more accurate long-term comparison of data.

LOCAL POLICY

Core Strategy, 2011

2.3 The Core Strategy contains one strategic policy pertaining 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 as 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 SDA*
- *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."

2.4 The Core Strategy policies listed below also make reference to retail health.

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

Development Sites and Policies (DSP) Plan

2.5 The 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 replace the Local Plan Review (2000) Saved Policies. The relationship between adopted policy and those from the Local Plan Review (2000) is set out in Table 2.

Table 2: Local Plan Review (2000) Policies and Replacement Policies

Local Plan Review (2000) Policy	**Local Plan Replacement Policy**
S1: Fareham Town Centre Strategy	EXPIRED 2007 CS3 The Vitality and Viability of Centres (LP1) CS8 Fareham Town Centre (LP1)
S2: Shopping in the Retail Core, Fareham Town Centre	CS3 The Vitality and Viability of Centres (LP1) CS8 Fareham Town Centre (LP1) DSP20 New Retail Development in Fareham Town Centre (LP2)
S3: Non-Retail Uses in the Retail Core, Fareham Town Centre	CS3 The Vitality and Viability of Centres (LP1) CS8 Fareham Town Centre (LP1) DSP21 Primary Shopping Area (LP2) DSP22 Secondary Shopping Area (LP2)
S4: Market Quay, Fareham	EXPIRED 2007 DSP27 Market Quay (LP2)

Local Plan Review (2000) Policy	Local Plan Replacement Policy
S6: Shopping Development in District and Local Centres	CS3 The Vitality and Viability of Centres (LP1) CS9 Development in the Western Wards and Whiteley (LP1) CS11 Development in Portchester, Stubbington and Titchfield (LP1) DSP34 Development in District Centres, Local Centres and Local Parades (LP2) DSP35 Locks Heath District Centre (LP2) DSP36 Portchester District Centre (LP2)
S7: Non-Retail Uses in District and Local Centres and Parades	DSP34 Development in District Centres, Local Centres and Local Parades (LP2)
S8: Retention of Local Shops	DSP38 Local Shops (LP2)
S9: New Local Shops	DSP38 Local Shops (LP2)
S10: Out-of-Centre Shopping	CS3 The Vitality and Viability of Centres (LP1) DSP37 Out-of-Town Shopping (LP2)
S11: Retail Warehouses	CS3 The Vitality and Viability of Centres (LP1) DSP37 Out-of-Town Shopping (LP2)

2.6 The RHC undertaken in Summer 2014 introduced the monitoring of Local Plan Review (2000) Policy S7: Non-Retail Uses in District and Local Centres and Parades. However, with the adoption of the DSP Plan in June 2015, Local Plan Review (2000) Policy S7 has been replaced by DSP Plan policy DSP34: Development in District Centres, Local Centres and Local Parades. Notwithstanding the policy change, the performance indicator used for the monitoring of LPR (2000) policy S7 remains applicable to the monitoring of the performance of policy DSP34.

3 Diversity of Uses

3.1 The diversity of town centre uses is assessed based on observation by Council officers. This exercise collects data on the use of each unit, from which we can ascertain the split of use classes within both the Primary and Secondary Shopping Areas.

3.2 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.

3.3 Floorspace calculations were taken as the total floorspace of each unit as calculated by FBC GIS mapping. Whilst this does not take account of differences between total and sales floorspace figures it does provide a consistent approach to floorspace calculations.

3.4 As well as looking at the use class, each unit was also classified depending 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)

3.5 This analysis helps to provide an overview of the type and occupancy of the ground floor units that are within the centre at the time of this study.

4 Centre Analysis

Fareham Town Centre

Table 3: Groundfloor Unit Occupancy			
	Number of units	Change from Summer 2014	% of total units
Total	**369**	**+18**	**91.9**
Vacant	**30**	**-2**	**8.1**
USE CLASSES			**% of occupied units**
A1	**160**	**-1**	**47.2**
A2	**57**	**-1**	**16.8**
A3	**31**	**+1**	**9.1**
A4	**9**	**-1**	**2.7**
A5	**14**		**4.1**
B1	**14**		**4.1**
B2	**1**		**0.3**
C1	**2**	**+1**	**0.6**
D1	**21**	**+6**	**6.2**
D2	**8**	**+2**	**2.4**
Sui Generis	**22**	**+5**	**6.5**
RETAIL GROUP			
Automotive	**6**	**+2**	**1.8**
Clothing	**30**	**-1**	**8.9**
Convenience	**15**	**+2**	**4.429**
Eating Out	**53**	**+4**	**15.639**
Home & Electronics	**21**	**-4**	**6.2**
Mixed Retail	**39**	**+3**	**11.5**
Other	**17**	**+2**	**5.0**
Recreation	**26**	**0**	**7.7**
Services	**80**	**+7**	**23.6**
Wellness	**52**	**+5**	**15.3**

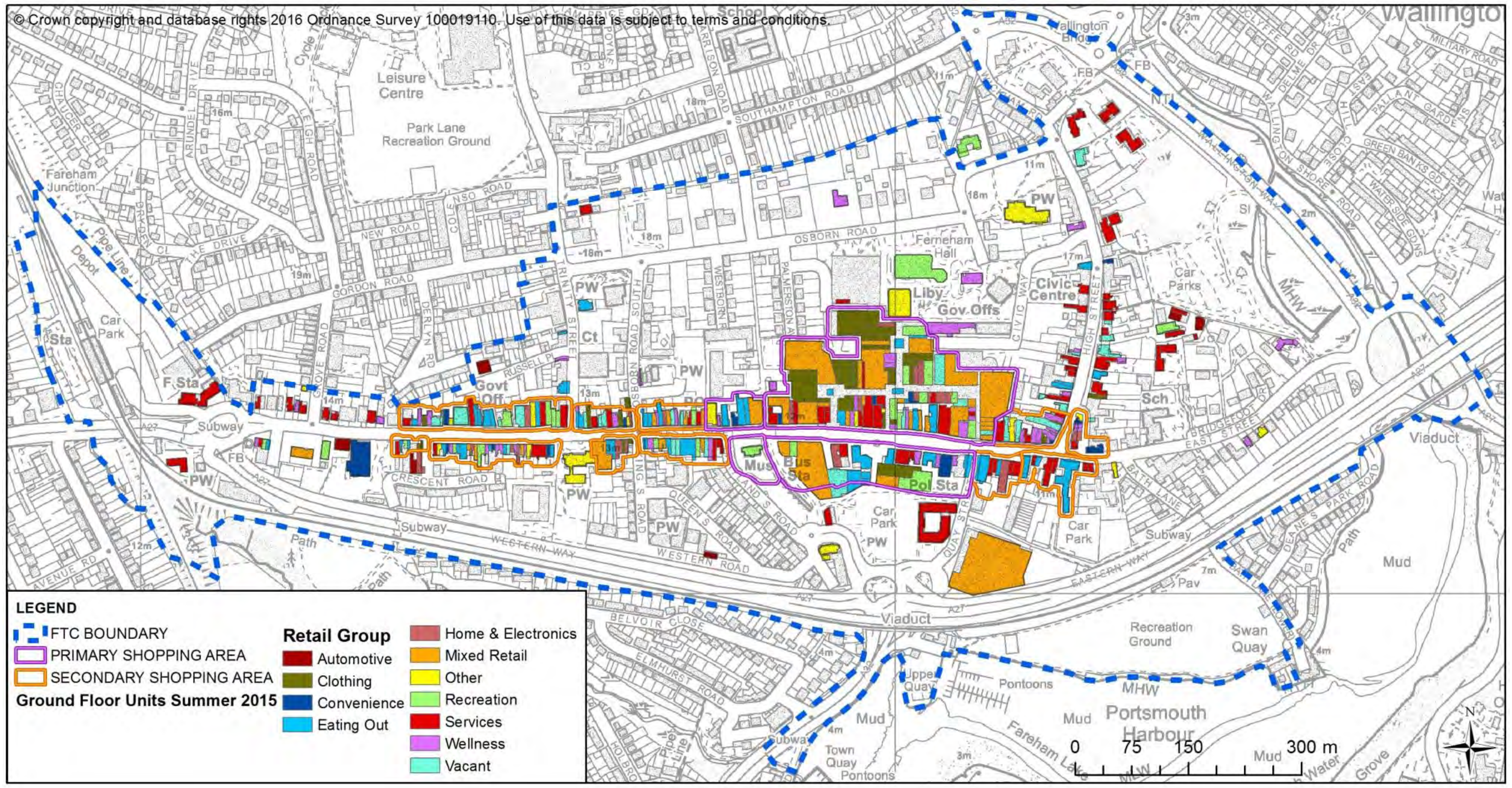


Figure 1: Fareham Town Centre Retail Uses

<u>Overview</u>

Fareham Town Centre continues to be the Borough's largest and most diverse shopping destination serving not only the Borough, but a wider catchment area including parts of Gosport, Winchester, Portsmouth and Southampton. The centre benefits from having almost 4000 office workers within walking distance.

Within the Town Centre, 369 ground floor units were recorded, 30 (8.13%) of which observed to be vacant. The most dominant use is retail A1, with A2 uses being the second most prevalent. B1 and A5 uses have an equal representation while B2 uses are the least prevalent. Fareham Town Centre includes both primary and secondary shopping areas. Both areas are retail orientated with the majority of units falling within the Services retail group.

<u>Policy Monitoring</u>

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 DSP 34 as the majority of units are occupied by A1 retail uses.

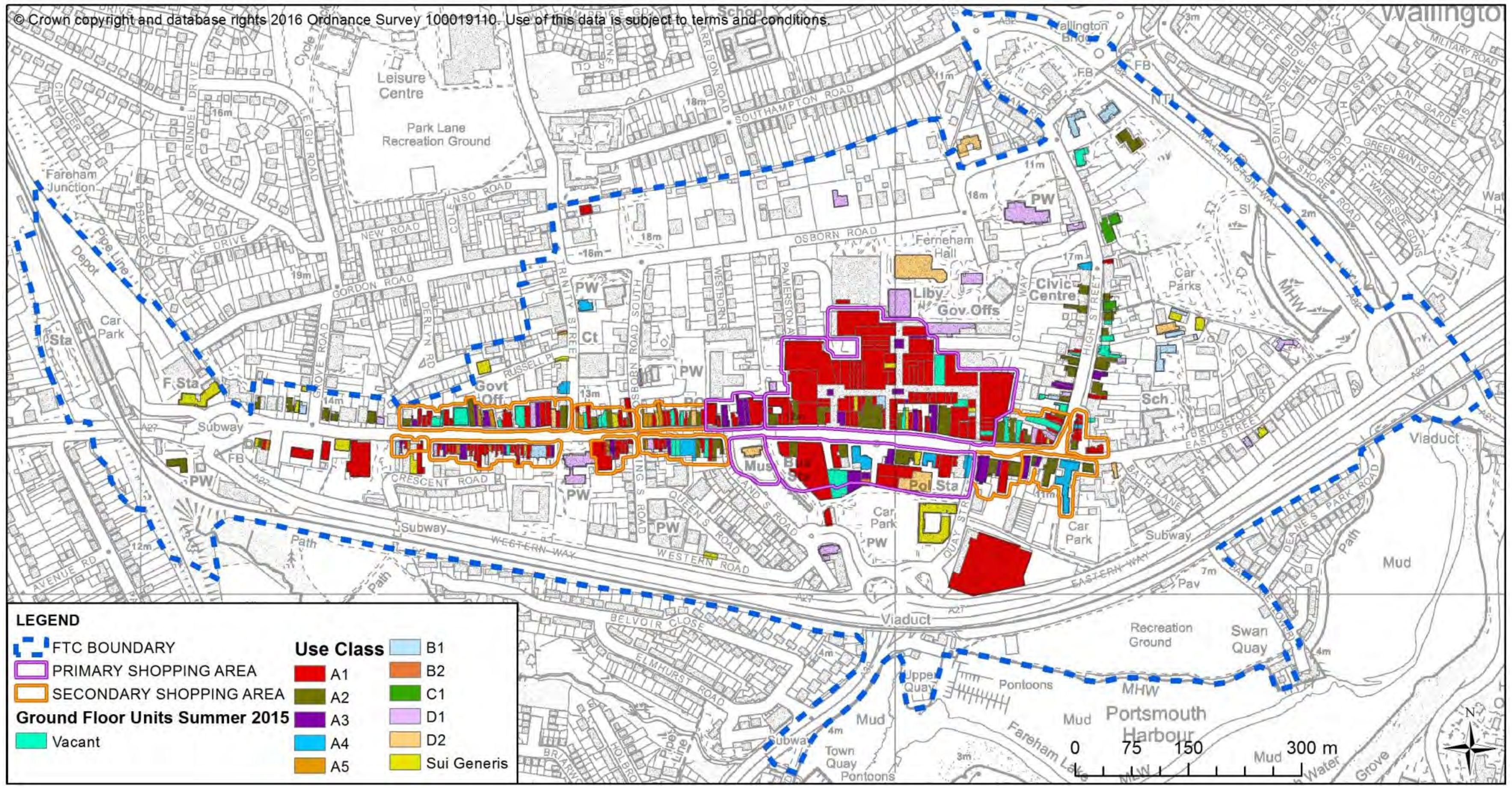


Figure 2: Fareham Town Centre Retail Use Classes

Table 4: Fareham Town Centre (Primary Shopping Area) Groundfloor unit occupancy

	Number of units	Change	% of total units
Total	**128**	**0**	
Vacant	**5**	**-4**	**3.91**
			% of occupied units
USE CLASSES			
A1	84	+3	68.29
A2	13	0	10.57
A3	13	+1	10.57
A4	3	-1	2.44
A5	1	0	0.81
B1	2	0	1.63
B2	0	0	0
C1	0	0	0
D1	0		0
D2	2	0	1.63
Sui Generis	5	0	4.07
RETAIL GROUP			
Automotive	0	0	0
Clothing	20	0	16.26
Convenience	5	1	4.07
Eating Out	17	0	13.82
Home & Electronics	10	-2	8.13
Mixed Retail	27	+5	21.95
Other	3	0	2.44
Recreation	11	-1	8.94
Services	17	0	13.82
Wellness	13	+1	10.57

Primary Shopping Area

In terms of numbers of units, the primary shopping area has fewer units compared to the secondary shopping area with a total of 128 units recorded. The number of vacant units has nearly halved in comparison to the last RHC in 2014 with a total of only 5 units recorded as vacant.

There have been no major changes in the centre since the Summer 2014 survey. The primary shopping area retains larger chain retail outlets such as BHS, M&S, Wilkinson, Boots, Next, New Look and TK Maxx. With the exception of a number of small cafes and a beauty salon, the indoor shopping centre is almost entirely made up of A1 shops while the pedestrianised area of West Street offers a more varied mix of uses, including a concentration of banks and building societies in the central area.

Table 5: Fareham Town Centre (Secondary Shopping Area) Groundfloor unit occupancy

	Number of units	Change	% of total units
Total	**241**	**+18**	
Vacant	**25**	**+2**	**10.37**
			% of occupied units
USE CLASSES			
A1	76	-4	35.19
A2	44	-1	20.37
A3	18	0	8.33
A4	6	0	2.78
A5	13	+4	6.02
B1	12	+4	5.56
B2	1	+1	0.46
C1	2	+1	0.93
D1	21	+6	9.72
D2	6	-1	2.78
Sui Generis	17	+5	7.87
RETAIL GROUP			
Automotive	6	+2	2.78
Clothing	10	-1	4.63
Convenience	10	+1	4.63
Eating Out	36	+4	16.67
Home & Electronics	11	-2	5.09
Mixed Retail	12	-2	5.56
Other	14	+2	6.48
Recreation	15	-1	6.94
Services	63	+7	29.17
Wellness	39	+6	18.06

Secondary Shopping Area

In comparison to the primary shopping area, the secondary shopping area has a higher number of recorded units with 241 units recorded in total. The number of vacant units has increased slightly in comparison to the summer 2014 survey with 25 vacancies now recorded.

The secondary shopping area accommodates a significant number of smaller/independent retailers and start-up businesses and as a result, experiences rapid turnovers of occupiers as well as high levels of temporary vacancies.

Figure 3: Primary Shopping Area Floorspace by Use Class

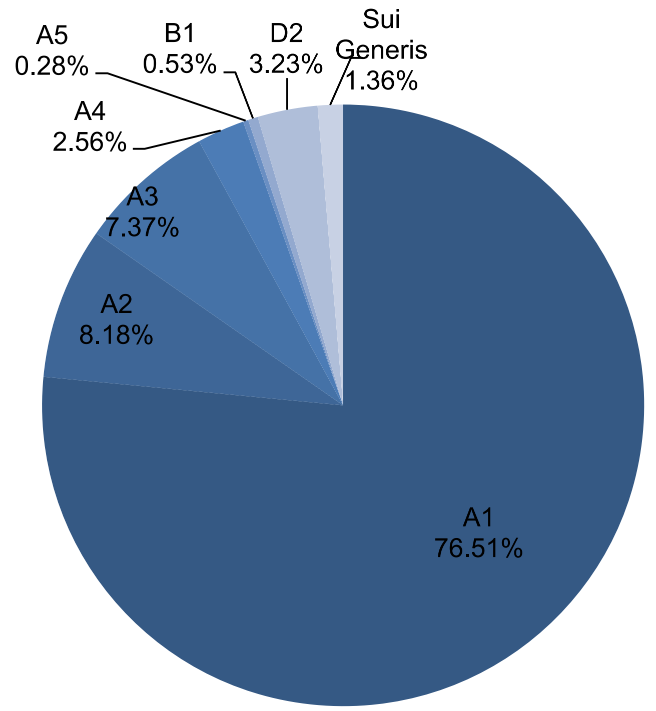
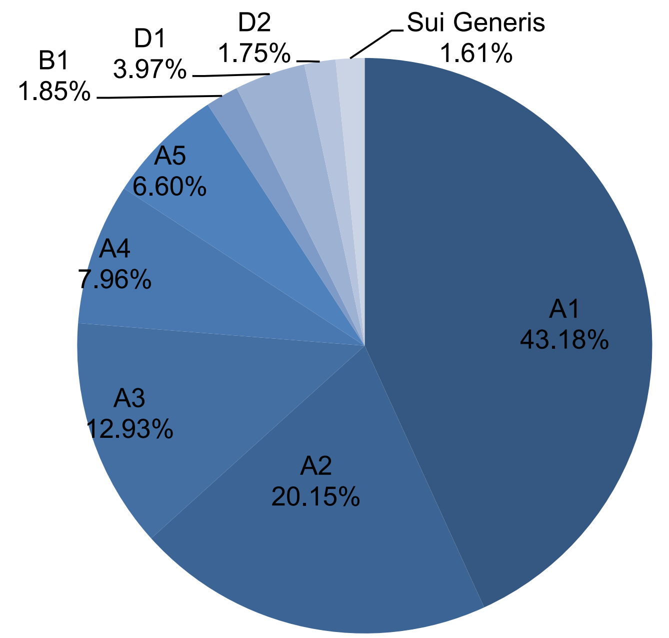


Figure 4: Secondary Shopping Area Floorspace by Use Class



Floorspace Distribution

An analysis of how floorspace by use class is distributed has been conducted to give a more accurate representation of land use compared with unit numbers alone.

Floorspace distribution reveals that retail A1 uses occupy the largest proportion of floorspace in both the Primary (76.51%) and Secondary shopping areas (43.18%).

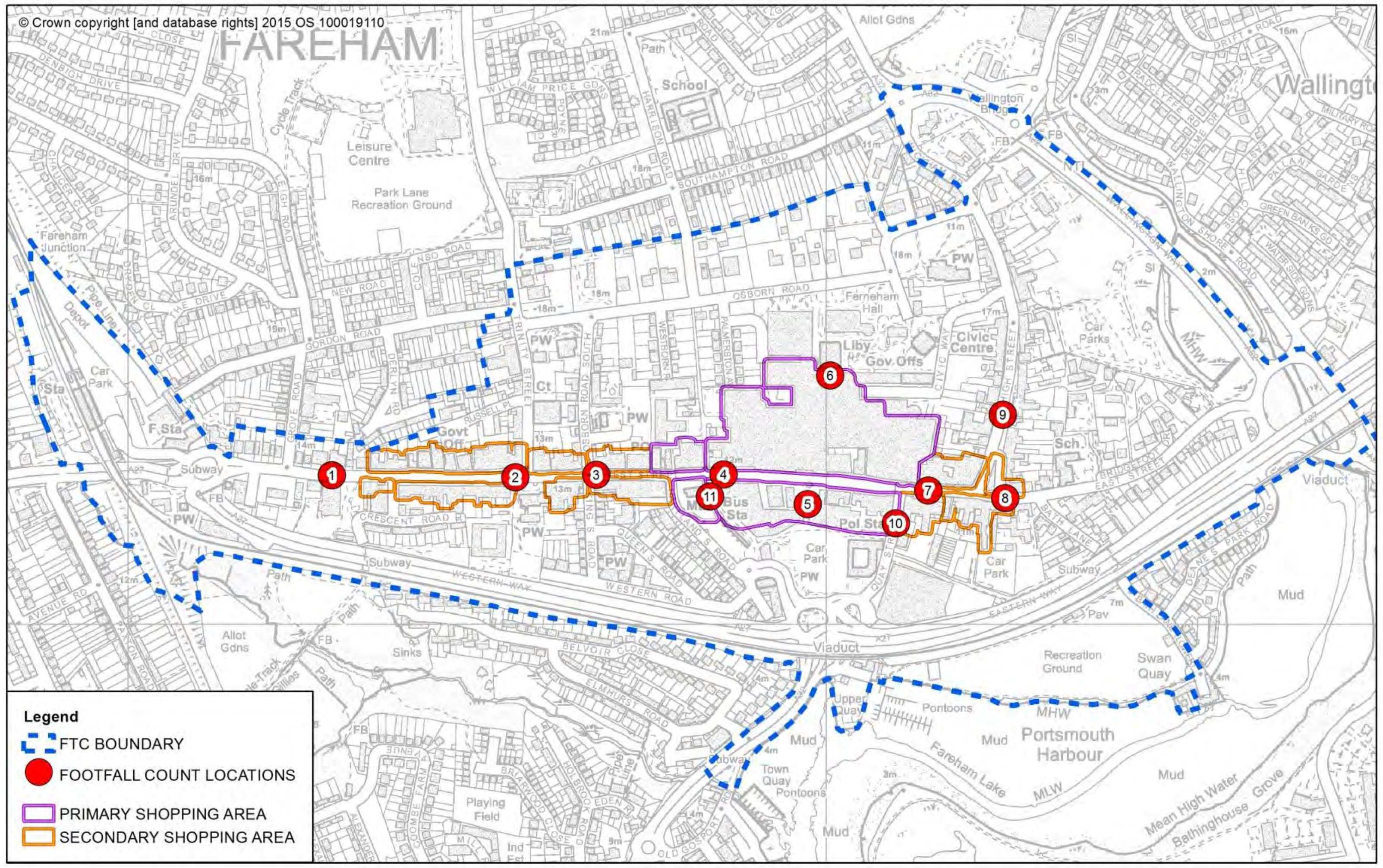


Figure 5: Footfall Count Locations in Fareham Town Centre

<u>Vacancy rates</u>

Within Fareham Town Centre as a whole, there were 369 ground floor units recorded, 30 (8.13%) of which are currently vacant. This represents a 1% reduction as a proportion of units compared to the summer 2014 survey.

<u>Pedestrian Flows</u>

Footfall counts were undertaken at the 11 locations shown on Figure 3. These locations were specifically selected as they represent the major entry and exit points of the Primary Shopping Area (locations 3,4,5,6,& 7) as well as points outside of the Primary Shopping Area, along High Street (9), East Street (8)and West Street (1&2). The footfall surveys were undertaken on Friday 12th July, Monday 15th July and Saturday 27th July 2015. All counts were undertaken between 10 am and 12 noon. The footfall counts are conducted over three different days in order to ascertain the effect of Fareham"s weekly market on pedestrian footfall in the Town Centre, as well as accounting for daily changes.

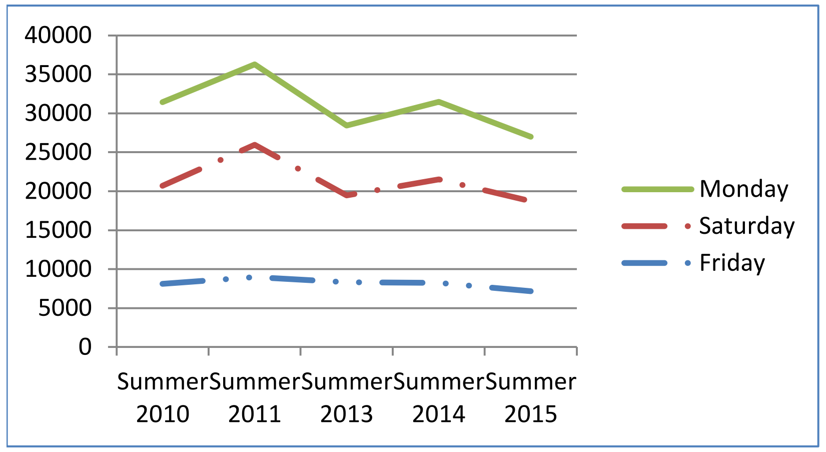
Location 10 on Quay Street, leading to Tesco (shown as 10), was added in winter 2011 following the opening of Tesco, whilst location 11 - Hartlands Road, leading to Fareham Bus Station, was added in winter 2012.

Overall there was a reduction in footfall in comparison to the Summer 2014 survey. Future RHCs will monitor the situation to establish if this is part of a wider trend of decline in footfall. Further work will be undertaken as part of the Local Plan Review to assess the current retail performance of Fareham Town Centre and recommend any relevant adjustment to Planning Policy, to encourage the appropriate mix of uses to optimise its vitality and viability.

Table 6: Fareham Town Centre Footfall Counts

Location	**Friday 12th July 2015 (per hour)**	
1	East: 150	West: 90
2	East: 204	West: 204
3	East: 378	West: 198
4	East: 696	West: 1326
5	North: 492	South: 324
6	North: 414	South: 666
7	East: 354	West: 426
8	East: 42	West: 60
9	North: 72	South: 54
10	North: 210	South: 144
11	North: 396	South: 252
Location	**Saturday 27th July 2015 (per hour)**	
1	East: 372	West: 60
2	East: 504	West: 444
3	East: 840	West: 468
4	East: 1080	West: 1704
5	North: 876	South: 924
6	North: 672	South: 1032
7	East: 444	West: 420
8	East: 168	West: 72
9	North: 180	South: 216
10	North: 252	South: 288
11	North: 324	South: 240
Location	**Monday 15th July 2015 (per hour)**	
1	East: 138	West: 90
2	East: 480	West: 198
3	East: 414	West: 210
4	East: 990	West: 1224
5	North: 564	South: 360
6	North: 330	South: 900
7	East: 300	West: 738
8	East: 36	West: 84
9	North: 60	South: 60
10	North: 150	South: 252
11	North: 330	South: 360

Figure 6: Pedestrian footfall in Fareham Town Centre 2010 - 2015



Portchester District Centre

Table 7: Groundfloor Occupancy

	Number of units	Change	% of total units
Total	71	+3	
Vacant	4	0	2.94
			% of occupied units
USE CLASSES			
A1	35	0	52.24
A2	12	-1	17.91
A3	4	0	5.97
A4	1	0	1.49
A5	3	+1	4.48
B1	0	0	0
B2	0	0	0
C1	0	0	0
D1	4	-1	5.97
D2	1	+1	1.49
Sui Generis	7	+2	10.45
RETAIL GROUP			
Automotive	1	0	1.49
Clothing	1	0	1.49
Convenience	5	0	7.46
Eating Out	8	+1	11.94
Home & Electronics	4	-1	5.97
Mixed Retail	8	-1	11.94
Other	5	0	7.46
Recreation	8	+1	11.94
Services	15	1	22.39
Wellness	12	+1	17.91

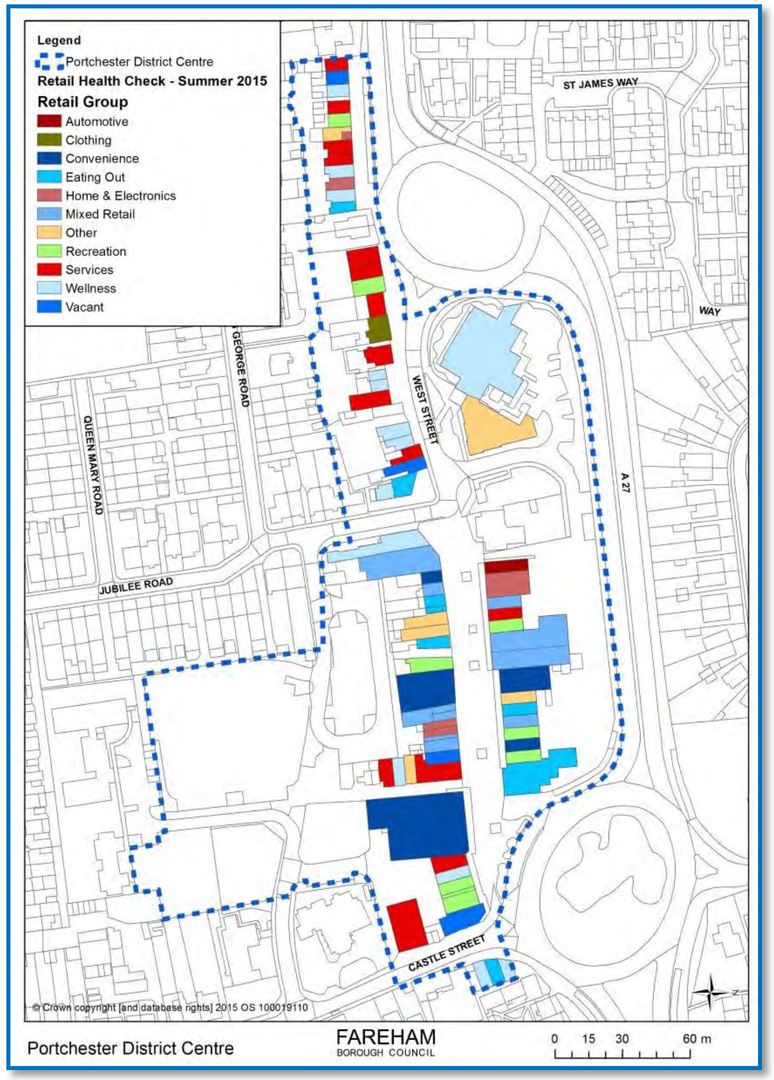


Figure 6: Portchester District Centre Retail Uses

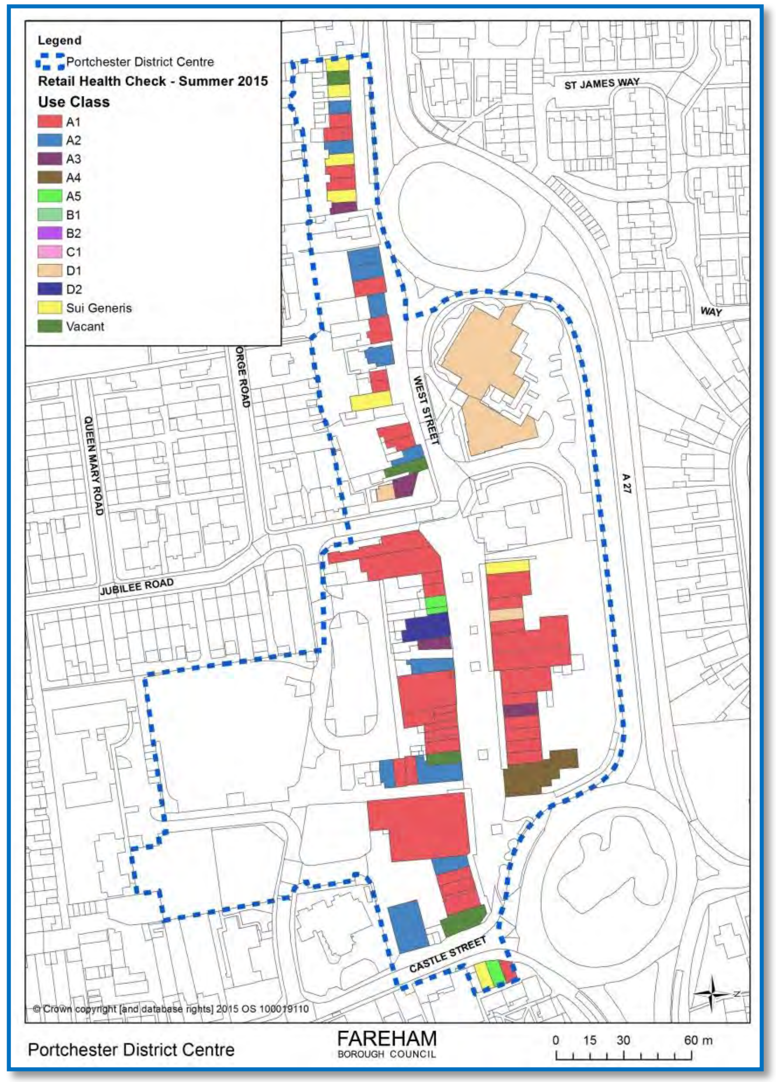


Figure 7: Portchester District Centre Retail Use Classes

Overview

Portchester is a district centre which principally serves the residents of Portchester, as well as residential areas to the east, within Portsmouth. The Centre has 68 units, making it the second largest centre in the Borough, with only two units observed to be vacant, one less than the Summer 2014 RHC, giving a vacancy rate of 3%

Of the occupied units, A1 shops make up over half of the units (52%) and include all of the centre's largest retail units: Superdrug, Iceland, Coopers and Co-op. A relatively high proportion (16%) 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%) and wellness units (18%), with a low number of clothing, home and electronics and "other uses" units. This goes to show that Portchester is a provider of local convenience services rather than a destination for comparison shopping.

Policy Monitoring

Current unit occupancy complies with policy DSP 34, as the majority of units are occupied for retail uses.

Policy DSP 36: Portchester District Centre relates to new development in Portchester District Centre. At the time of the survey, no new development was being undertaken in Portchester District Centre. Future Retail Health Checks will provide an update as and when proposals for new development come forward.

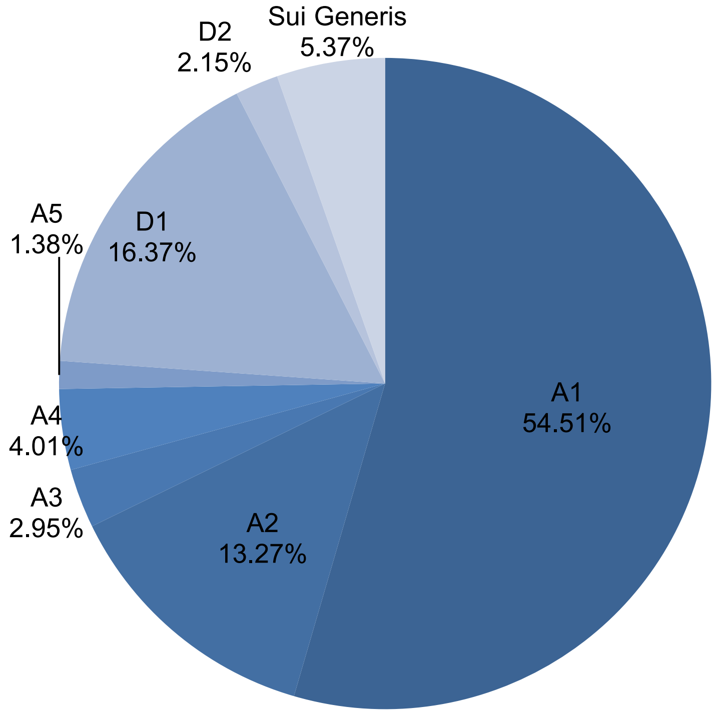


Figure 8: Floorspace Use Class of Occupied Units

Locks Heath District Centre

Table 8: Groundfloor Unit Occupancy			
	Number of units	Change	% of total units
Total	27	0	
Vacant	0	-1	0
			% of occupied units
USE CLASSES			
A1	17	+1	62.96
A2	3	0	11.11
A3	3	0	11.11
A4	1	0	3.70
A5	1	1	3.7
B1	0	0	0
B2	0	0	0
C1	0	0	0
D1	1	0	3.70
D2	1	0	3.70
Sui Generis	0	0	0
RETAIL GROUP			
Automotive	0	0	0
Clothing	0	0	0
Convenience	6	-1	22.22
Eating Out	5	+1	18.52
Home & Electronics	0	0	0
Mixed Retail	4	+2	14.81
Other	4	0	14.81
Recreation	1	0	3.70
Services	4	0	14.81
Wellness	3	0	11.11

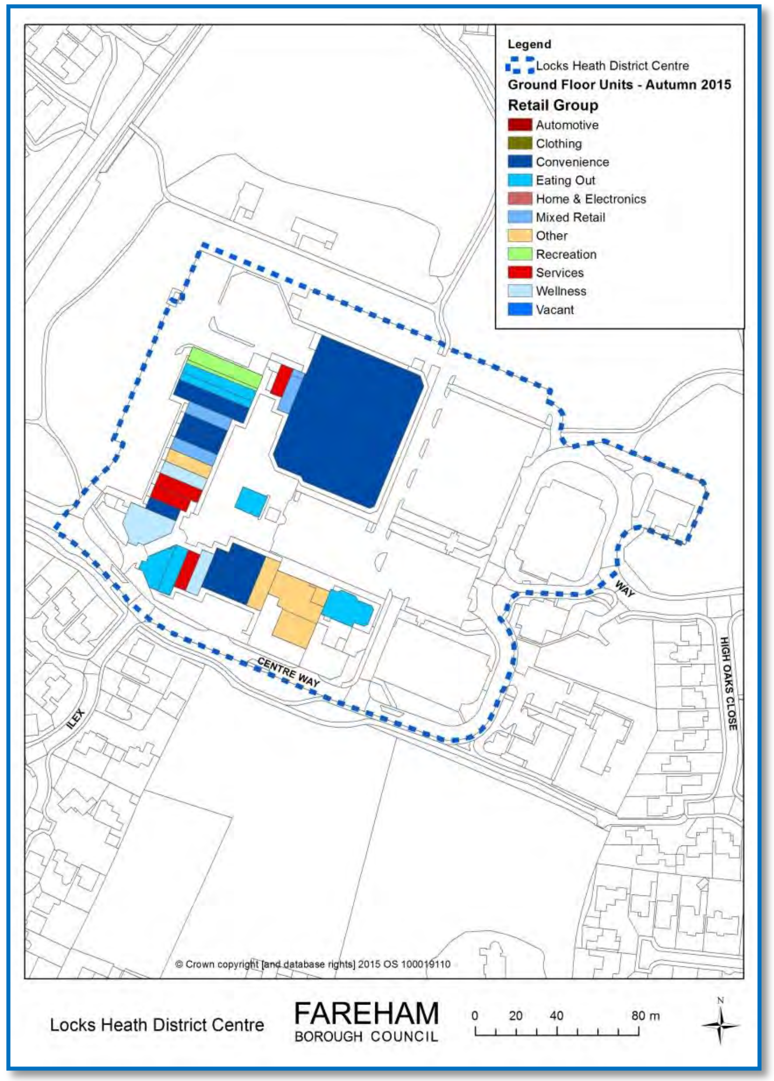


Figure 8: Locks Heath District Centre Retail Uses

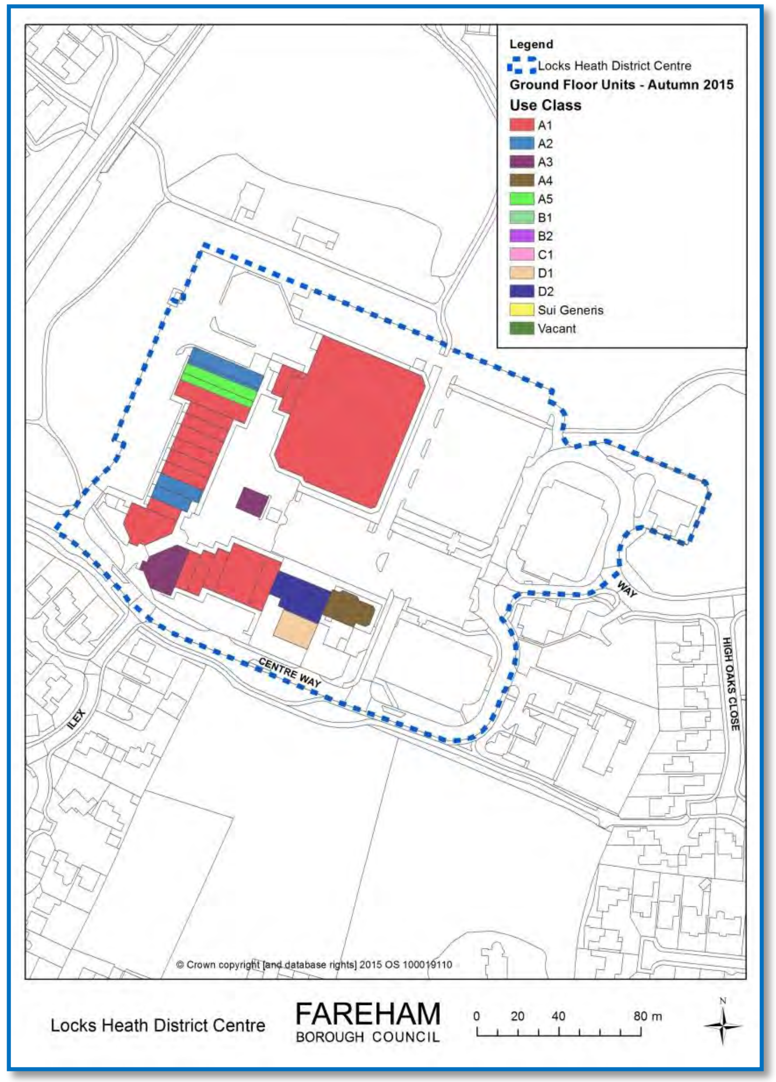


Figure 9: Locks Heath District Centre Retail Use Classes

Overview

The Centre at Locks Heath is centrally located within the residential areas in the Western Wards 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 central pedestrianized courtyard. There are currently 27 units within the centre, none of which are vacant, one less than in Summer 2014.

In Locks Heath District Centre, A1 shops account for over 62% of the units and just over 73% of the floorspace, with over half of this floorspace being used for mixed retail 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 convenience needs, but is not a main shopping destination for comparison goods. Locks Heath Centre continues to be a stable and well used centre.

Policy Monitoring

Current unit occupancy complies with policy DSP 34 as the majority of units are occupied for A1 retail uses.

Policy DSP 35: Locks Heath District Centre identifies the potential for the centre to accommodate up to 2000 sq.m of additional convenience floorspace and additional cafes, restaurants and comparison retail units of a scale appropriate to the District Centre. To date there has been no additional convenience floor space developed; however, future retail health checks will continue to monitor the situation and provide updates as appropriate.

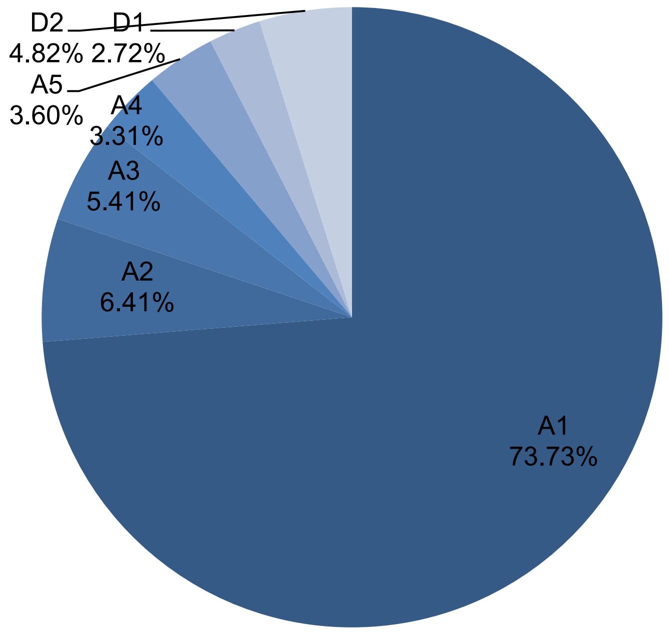


Figure 10: Floorspace Use Class of Occupied Units

Stubbington Local Centre

Table 9: Groundfloor Unit Occupancy			
	Number of units	Change	% of total units
Total	42	1	
Vacant	1	0	2.38
			% of occupied units
USE CLASSES			
A1	25	+1	58.54
A2	7	-1	19.51
A3	3	+1	4.88
A4	1	0	2.44
A5	3	-1	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	7	+1	14.63
Eating Out	7	0	17.07
Home & Electronics	1	0	2.44
Mixed Retail	5	-1	14.63
Other	4	0	9.76
Recreation	2	0	4.88
Services	8	-1	19.51
Wellness	5	0	12.2

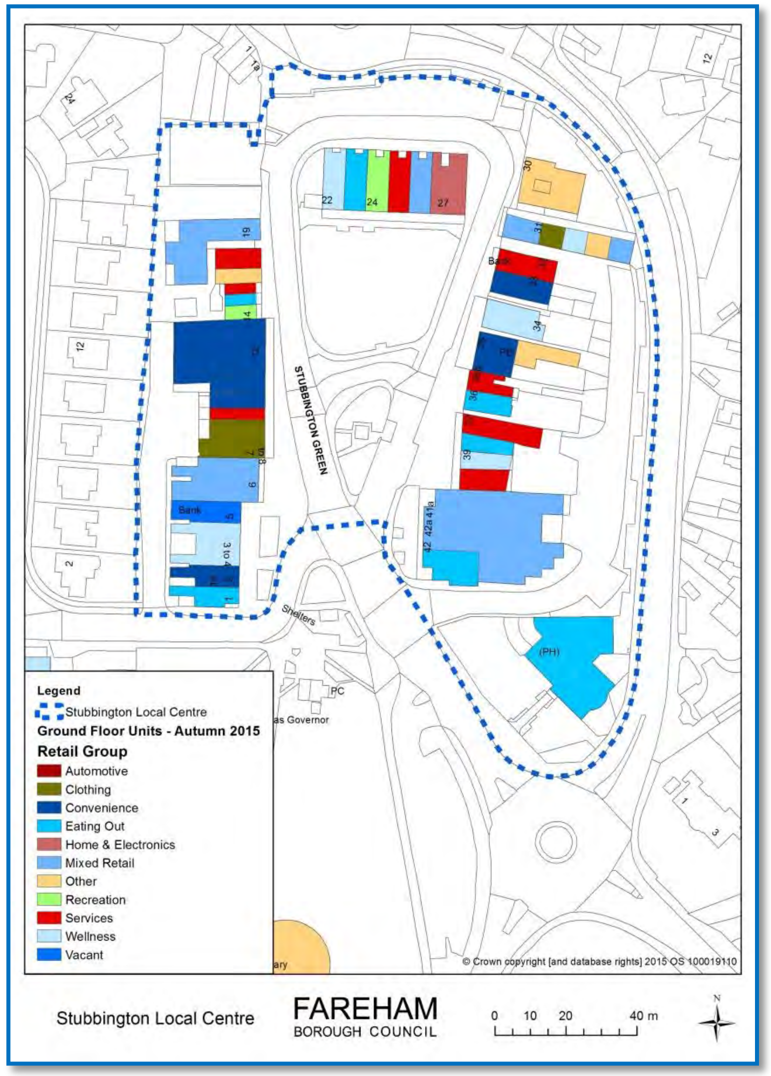


Figure 11: Stubbington Local Centre Retail Uses

Figure 12: Stubbington Local Centre Retail Use Classes

Overview

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 public open space. Stubbington Local Centre currently has 42 units, only one of which is vacant. In recent years, the local centre has seen the departure of Budgens, which was subsequently split into two units, now occupied by the Co-op and Costa.

Almost 60% of the centre‟s occupied units are A1 shops (66% of occupied floorspace), 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.

It is evident that Stubbington Local Centre continues to be a stable and relatively successful retail centre.

Policy Monitoring

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

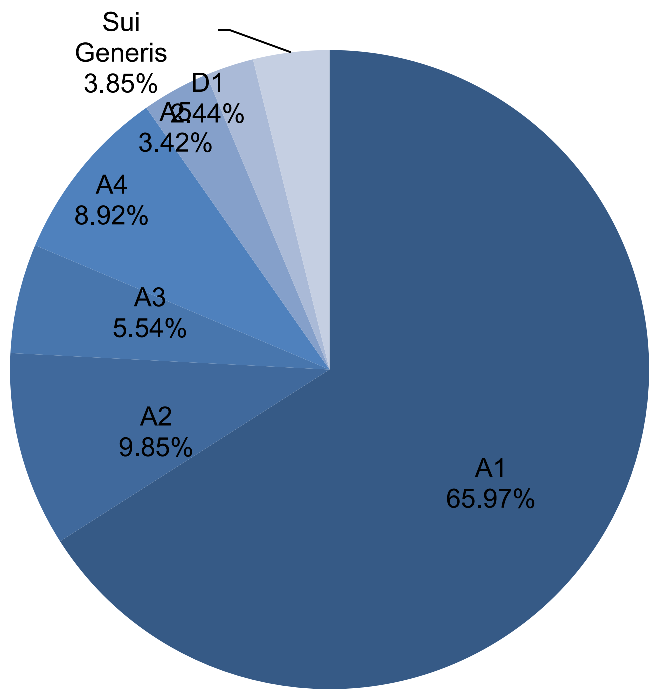


Figure 13: Floorspace Use Class of Occupied Units

Park Gate Local Centre

Table 10: Groundfloor Unit Occupancy			
	Number of units	Change	% of total units
Total	56	-1	
Vacant	0	-2	0
			% of occupied units
USE CLASSES			
A1	20	+1	35.71
A2	26	+1	46.43
A3	3	0	5.36
A4	0	0	0
A5	2	1	3.57
B1	1	-1	1.79
B2	0	0	0
C1	0	0	0
D1	3	0	5.36
D2	0	0	0
Sui Generis	1	0	1.79
RETAIL GROUP			
Automotive	1	0	1.79
Clothing	1	0	1.79
Convenience	2	+1	3.57
Eating Out	5	0	8.93
Home & Electronics	5	0	8.93
Mixed Retail	0	0	0
Other	4	0	7.14
Recreation	4	0	7.14
Services	29	+2	51.79
Wellness	5	0	8.93

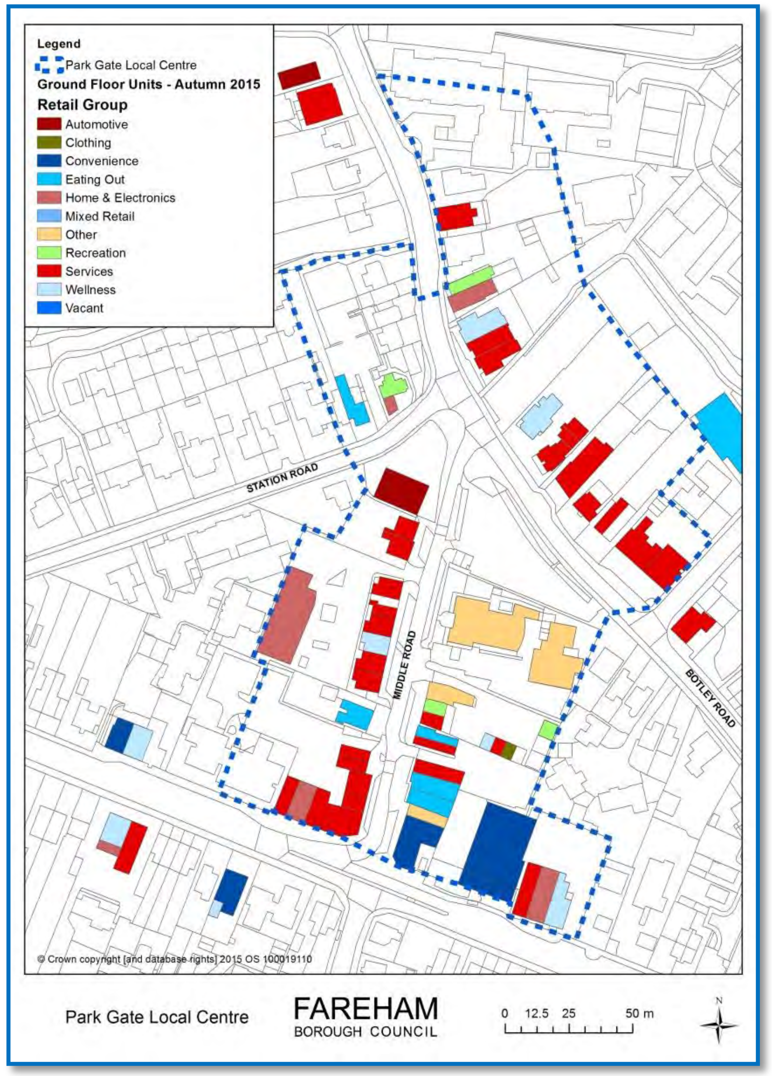


Figure 14: Park Gate Local Centre Retail Uses

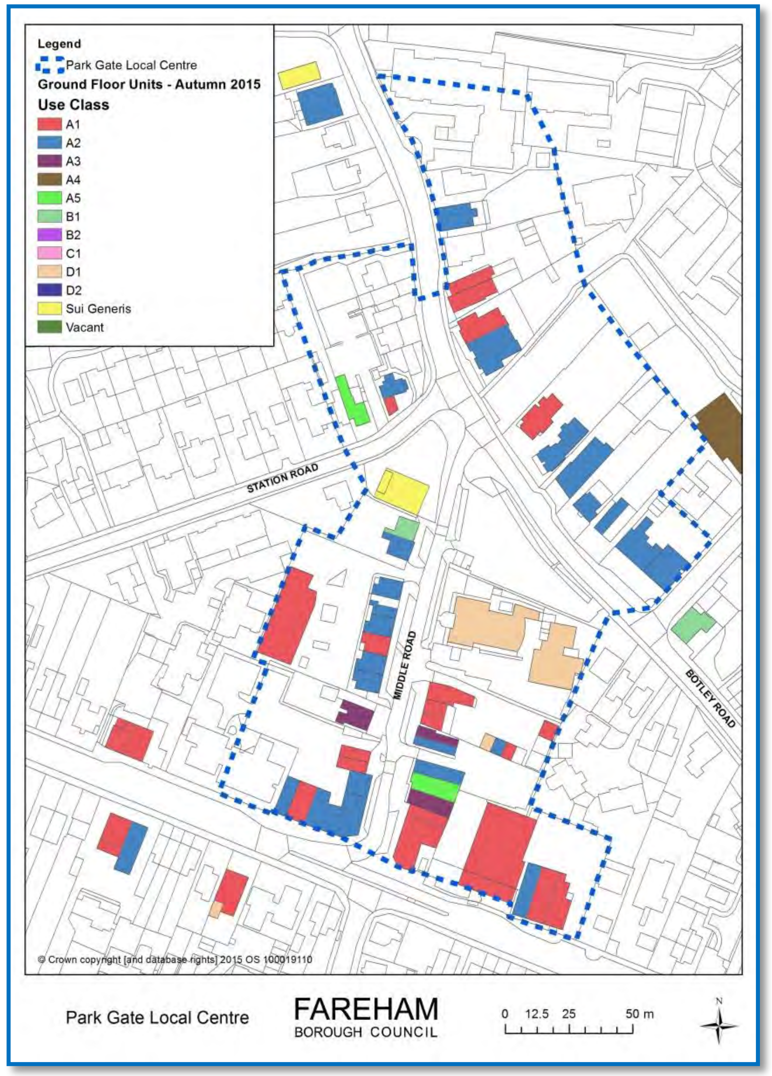


Figure 15: Park Gate Local Centre Retail Use Classes

<u>Overview</u>

In terms of numbers of units, Park Gate Local Centre is the third largest centre in the Borough with a total of 56 units. Since Summer 2014, one-unit was converted to a dwelling resulting in a slight reduction to the overall number of units. None of the units surveyed in Park Gate Local Centre were vacant, compared to 2 units recorded as vacant in summer 2014. There have been a few retailer changes in the centre, firstly with the addition of a Sainsbury"s Local store replacing Indespension Trailers and the addition of In Technology Logistics.

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 52% of the units in occupation.

There are very few large retail units in the centre; the new Sainsbury"s Local store is the largest at over 700 sqm in size. The Co-op and Lloyds TSB are the largest of the remaining units, both of which are below 500 sqm.

<u>Policy Monitoring</u>

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 DSP 34 in that the uses maintain active shop window displays.

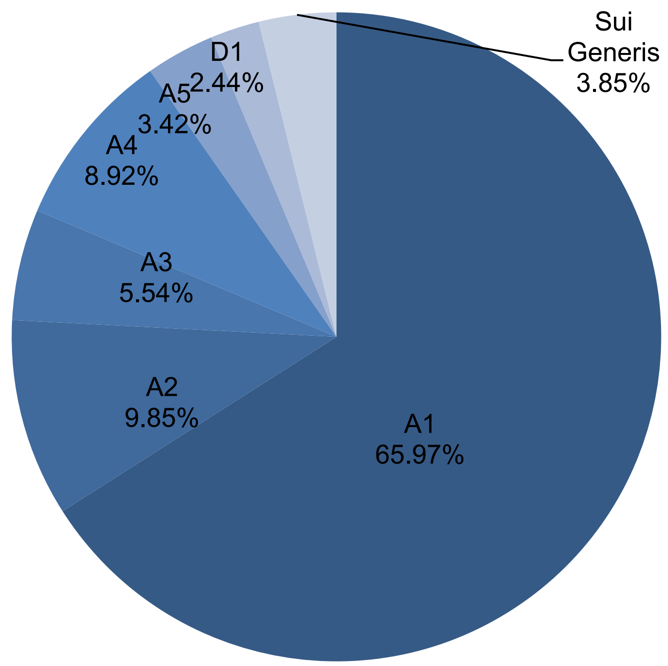


Figure 16: Floorspace Use Class of Occupied