

Fareham Borough Retail Health Check

Summary Paper 2020

Contents

Introduction.....	1
National Planning Policy Context	2
Local Planning Policy Context	3
Diversity of Uses	6
Centre Analysis	8
Fareham Town Centre	8
Portchester District Centre	14
Locks Heath District Centre	18
Stubbington Local Centre	22
Park Gate Local Centre	25
Broadlaw Walk (Fareham) Local Centre	28
Highlands Road (Fareham) Local Centre	31
Gull Coppice (Whiteley) Local Centre	34
Titchfield Local Centre	37
Warsash Local Centre	40
Footfall Count: Fareham Town Centre	43
Footfall Count: Portchester District Centre	46

Introduction

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

- Fareham Town Centre
- Portchester District Centre
- Locks Heath District Centre
- Stubbington Local Centre
- Park Gate Local Centre
- Broadlaw Walk (Fareham) Local Centre
- Highlands Road (Fareham) Local Centre
- Gull Coppice (Whiteley) Local Centre
- Titchfield Local Centre
- Warsash Local Centre

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

The data collected from monitoring the Borough's centres in the RHC helps inform the Council's approach to retail and main centres in the emerging Fareham Local Plan 2037. This annual update is also used to inform development management decisions on planning applications within the town, district and local centres.

The data collection for this health check was undertaken in June 2020. It should be noted that the footfall data will therefore be affected by the Covid-19 pandemic which has had a significant impact on retail nationally.

National Planning Policy Context

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

KPI	Definition/Function	Timescale	Method of Data Collection
Diversity of uses	The amount of space in use for different uses such as offices; shopping; leisure, cafes and hotels.	Annually (Summer)	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)	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.	Ongoing	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.	Ongoing	Local Plan evidence studies/consultation.
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.	Ongoing	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.	Ongoing	Local Plan evidence studies.
Pedestrian flows	A key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets.	Annually (Summer) for Fareham Town Centre & Portchester District 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.	Ongoing	Accessibility Background Paper
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.	Ongoing	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).	Ongoing	Local Plan evidence studies.

Table 1: Key performance Indicators

Local Planning Policy Context

Local Plan Part 1: Core Strategy

The Core Strategy (2011) contains a policy relating to retail health, Policy CS3. The primary intention of the Core Strategy policy is to maintain the overall retail hierarchy of the Borough's centres, with Fareham Town Centre remaining the largest. Core Strategy Policy CS3 is set out below.

CS3: Vitality and Viability of Centres

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

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

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

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

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

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

Local Plan Part 2: Development Sites and Policies Plan

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

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

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

The DSP Plan can be accessed from: <http://www.fareham.gov.uk/PDF/planning/LP2DSPAadopted.pdf>

Fareham Local Plan 2037 (Emerging)

The Council are in the process of producing a new Local Plan. This will address the development requirements up until 2037 and is intended to replace Local Plan Part 1 (Core Strategy) and Local Plan Part 2 (Development Sites & Policies) in due course.

Details of the timeframe for the Local Plan review can be found in the Local Development Scheme¹ and progress of the Fareham Local Plan 2037 is available on the Council's website.

¹ http://www.fareham.gov.uk/PDF/planning/local_plan/LocalDevelopmentScheme2020.pdf

Diversity of Uses

Council officers collected data on the use of each non-residential unit in the Borough’s main shopping centres (town centres, district centres and local centres). From this, every occupied unit was attributed a use class, providing an overall picture that demonstrates the diversity of uses in each centre. The basic definitions of the use classes frequently referred to in this document are set out in Table 2. This Retail Health Check took place in June 2020 prior to the amendment to the Town and Country Planning Use Classes Regulations² which took effect in September 2020 and therefore the data recorded reflects the use classes at the time of reporting.

Planning Use Class	Definition of Use
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	Restaurants and cafes. Sale of food and drink for consumption ON the premises.
A4	Pubs, bars or other drinking establishments.
A5	Takeaways. Sale of hot food for consumption OFF the premises.
B1	Business. Office (other than an A2 use), research and development of products and processes, studios, laboratories, high tech, any light industry.
B2	General industry. Industry other than that falling within B1.
C1	Hotel, boarding or guest house where no significant element of care is provided.
C2	Residential accommodation and care to people in need of care, hospital nursing home or residential school.
D1	The provision of health services, crèche, day nursery/centre, for providing education, place of worship, public exhibition hall, museum, library and art galleries.
D2	A cinema, concert hall, bingo hall/casino, swimming pool, dance hall, skating rink, gym or other area for indoor or outdoor sports/recreation.
Sui-generis	Uses that do not easily fall into any of the use class listed above, such as car showrooms/repair facilities, nail bars etc

Table 2: Use Class Definitions

² <https://www.legislation.gov.uk/ukSI/2020/757/made>

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

- **Automotive** (inc. car sales and repair)
- **Clothing** (inc. jewellery, shoes and accessories)
- **Convenience** (inc. food stores, bakers, butchers)
- **Eating Out** (inc. takeaways, restaurants, pubs)
- **Home & Electronics** (inc. furniture and appliances, mobile phones)
- **Mixed Retail** (inc. 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)

It is essential to identify the number of **vacant** units in each retail centre as vacancies are a key indicator of retail centre health. All retail centre floorspace is calculated from GIS mapping of the retail centres. Although sales floorspace often forms only a proportion of total floorspace, this has not been separately calculated. Furthermore, assessing total floorspace provides a consistent method that is appropriate to the scale and scope of this assessment.

Centre Analysis

Fareham Town Centre

Fareham Town Centre is the Borough's largest and most diverse shopping destination. It serves not only the Borough, but a wider catchment area including parts of Gosport, Winchester, Portsmouth and Southampton. Fareham Town Centre includes both Primary and Secondary Shopping Areas which perform different retail functions.

There are 370 units in Fareham Town Centre, 48 (13%) of which are vacant. This is a 3% increase since 2019 and generally vacancies in Fareham Shopping Centre have been increasing since 2015. This will have negative implications for the vitality of the town centre if the trend continues. The loss in the last year has been entirely in use class A1 (general retail), which has dropped from 157 trading units down to 145. The retail groups most affected within the use class were clothing and home & electronics.

However, the Town Centre continues to offer a good range of retail groups overall. 'Services' are the most prevalent group (75 units), and there is also a large quantity of 'Eating Out' (56) units. The largest increase in use class this year is in mixed retail, which has increased to 40 units.

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	370	0		89,623
Occupied	322	-11	87	78,394
Vacant	48	+11	13	11,229
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	145	-12	45.0	40,352
A2	46	0	14.3	8,504
A3	36	0	11.2	5,882
A4	8	0	2.5	2,925
A5	12	0	3.7	1,148
B1	10	0	3.1	1,676
B2	2	0	0.6	182
C1	2	0	0.6	767
D1	24	0	7.5	7,145
D2	9	0	2.8	4,048
Sui Generis	28	+1	8.7	5,765
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	6	0	1.9	1,387
Clothing	22	-7	6.8	7,012
Convenience	14	-2	4.4	1,690
Eating Out	56	0	17.4	9,955
Home & Electronics	23	-5	7.1	3,275
Mixed Retail	40	+5	12.4	21,578
Other	11	0	3.4	4,739
Recreation	22	-3	6.8	6,782
Services	75	+1	23.3	15,064
Wellness	53	0	16.5	6,912

Table 3: Fareham Town Centre Ground Floor Unit Occupancy

Fareham Town Centre - Summer 2020

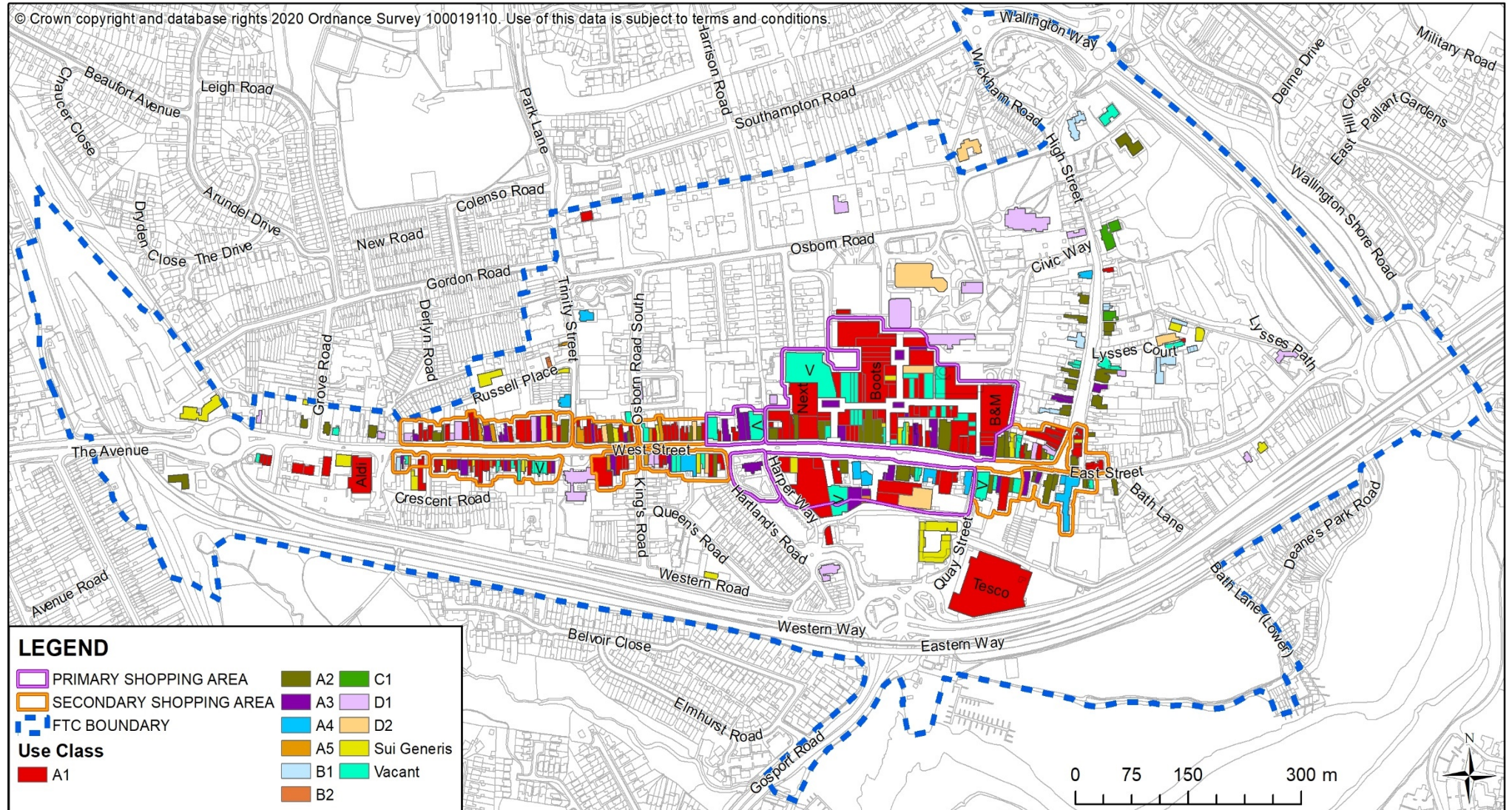


Figure 1: Fareham Town Centre Use Classes

Fareham Town Centre - Summer 2020

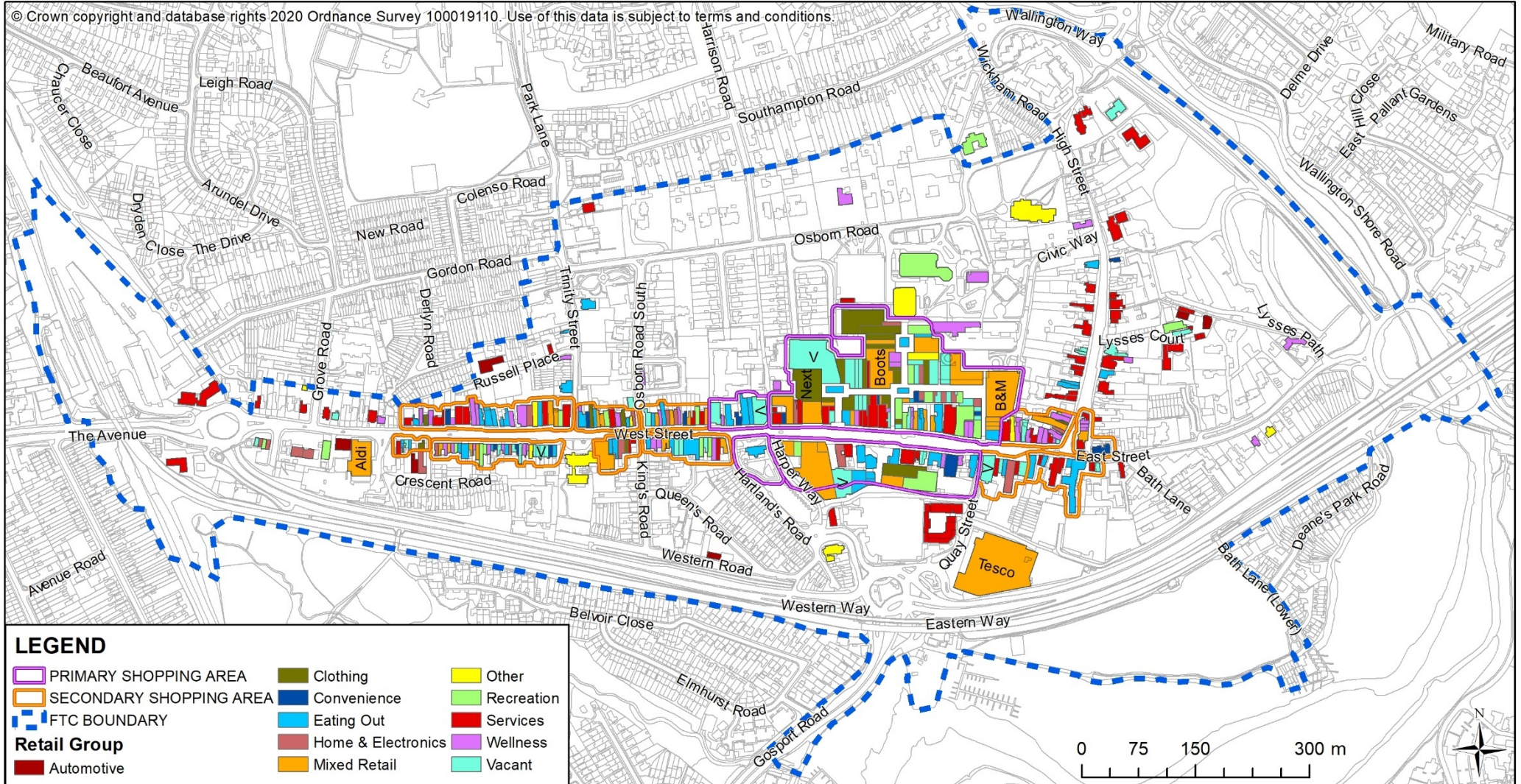


Figure 2: Fareham Town Centre Retail Groups

Primary Shopping Area

The Primary Shopping Area has a total floorspace of 40,341 sqm. The number of vacant units in the primary area has increased significantly during the reporting period from 14 to 25 units. The majority of the primary shopping area vacancies (eighteen) are located in Fareham Shopping Centre, being 5,565 sqm of floorspace or 27.6% of the total shopping centre floorspace. The significant losses include 'high-street' chain retail outlets Accessorize, Carphone Warehouse, Monsoon, River Island, Top Shop and Top Man.

Chart 1 illustrates that despite the increase in vacancies, the highest percentage of Primary Shopping Area units are in A1 use (64.1% of occupied units). The percentage of floorspace taken up by A1 use (23,198 sqm) is just over 70% of occupied floorspace.

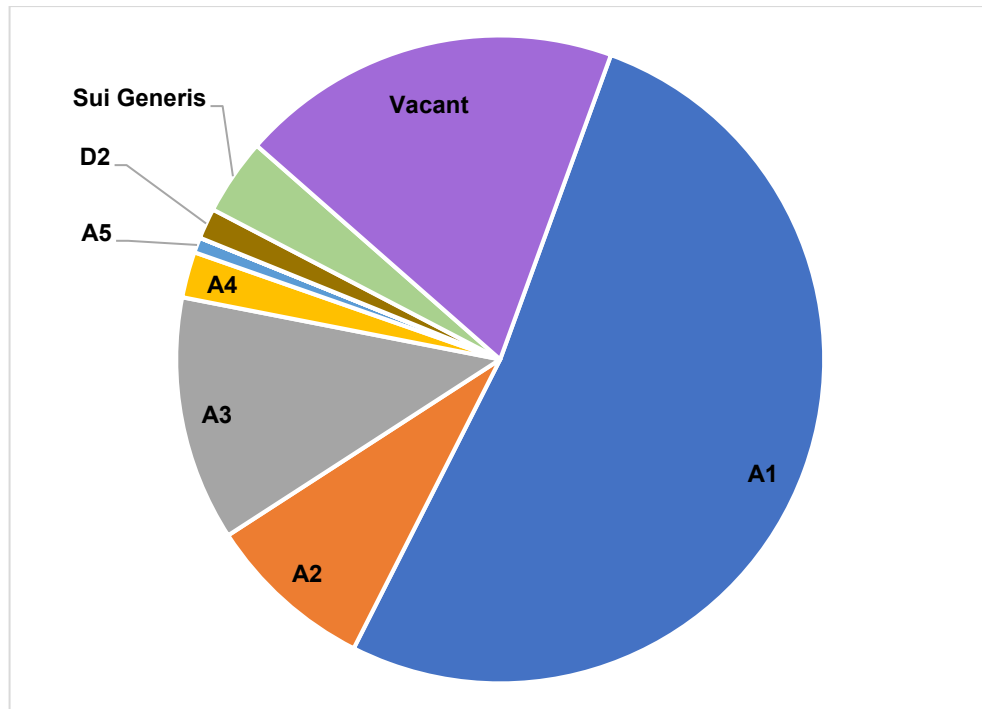


Chart 1: Fareham Town Centre Primary Shopping Area Distribution of Floorspace by Use Class

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	131	+1		40,341
Occupied	106	-10	80.9	32,498
Vacant	25	+11	19.1	7,843
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	68	-9	64.1	23,198
A2	11	0	10.4	2,811
A3	16	0	15.1	3,485
A4	3	0	2.8	979
A5	1	0	1.0	107
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	0	0	0.0	0
D2	2	0	1.9	1,347
Sui Generis	5	-1	4.7	571
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	16	-6	15.1	6,447
Convenience	6	0	5.7	889
Eating Out	20	0	18.9	4,571
Home & Electronics	9	-1	8.5	1,160
Mixed Retail	21	+1	19.8	11,544
Other	1	0	1.0	391
Recreation	10	0	9.4	3,353
Services	14	-1	13.2	3,088
Wellness	9	-3	8.5	1,055

Table 4: Fareham Town Centre Primary Shopping Area Ground Floor Unit Occupancy

Secondary Shopping Area

The Secondary Shopping Area accommodates many smaller/independent retailers and start-up businesses and has a total of 20,843 sqm floorspace.

The Secondary Shopping Area has remained consistent in the number of occupied units, with no additional vacancies and only small changes seen in use classes.

The Secondary Shopping Area caters for a wider range of uses, particularly, it provides more units of A2, A3 and A5 and D-class uses than the primary shopping area, however the largest proportion of units continues to be use class A1.

Some changes can be seen in the types of retail groups, with a loss of four of both recreation and home and electronics, with increases in mixed retail and wellness.

Chart 2 shows the more diverse distribution of use classes seen in the Secondary Shopping Area.

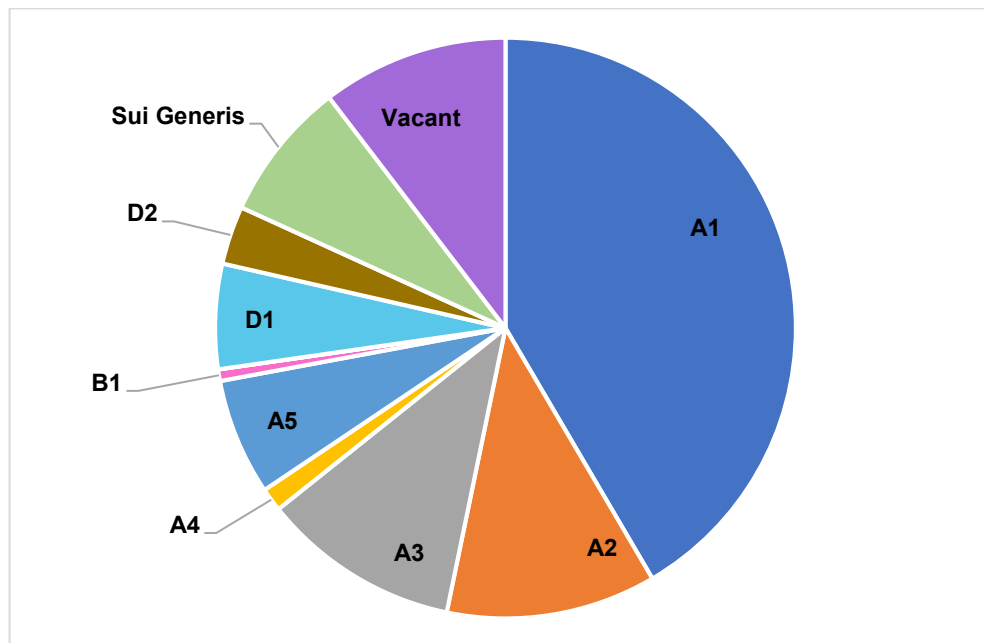


Chart 2: Fareham Town Centre Secondary Shopping Area: Distribution of Floorspace by Use Class

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	154	0		20,843
Occupied	138	0	89.6	18,506
Vacant	16	0	10.4	2,337
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	64	-2	46.5	8,538
A2	18	0	13.0	2,652
A3	17	0	12.3	1,989
A4	2	0	1.4	1,357
A5	10	0	7.2	1,001
B1	1	0	0.7	95
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	9	0	6.5	1,106
D2	5	0	3.6	591
Sui Generis	12	+2	8.8	1,177
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	6	-1	4.3	565
Convenience	7	-2	5.1	733
Eating Out	29	0	21.0	4,348
Home & Electronics	10	-4	7.2	1,631
Mixed Retail	17	+4	12.3	2,788
Other	4	0	2.9	568
Recreation	8	-3	5.8	992
Services	24	+2	17.4	3,474
Wellness	33	+4	24.0	3,407

Table 5: Fareham Town Centre Secondary Shopping Area Ground Floor Unit Occupancy

Policy Monitoring

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

Portchester District Centre

Portchester District Centre, located approximately two miles east of Fareham Town Centre, serves local residents in the east of the Borough as well as housing areas towards Portsmouth. There are 70 units totalling 10,334 sqm floorspace, making it the second largest retail centre in the Borough. The increase in unit numbers this year follows the completion of the planning permission at 2 West Street, which included the provision of an A1/A3 coffee shop.

At the time of the survey, 4 units (1,434 sqm floorspace) were vacant, reflecting a drop in the number of vacant units since 2019. However, the overall amount of vacant floorspace has increased from 571 sqm due to the closure of the Co-op, one of the key convenience shops for the centre. In terms of use class, the centre has remained consistent, with just over half of the occupied units in the centre being A1 shops. Most of these face onto the main shopping precinct and include “high-street” retailers such as The Card Factory, Iceland and Superdrug.

Portchester District Centre provides a good variety of retail groups to address local need. Although there are only two D1 units, they make up the second largest amount of occupied floorspace (17.4%) after A1 uses (49.6%) due to the sizeable Portchester Health Centre and Portchester Library.

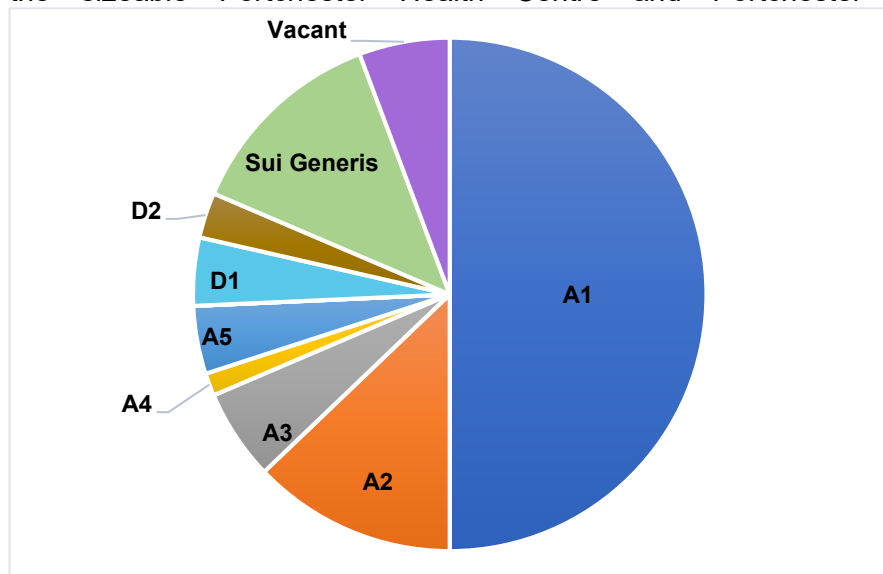


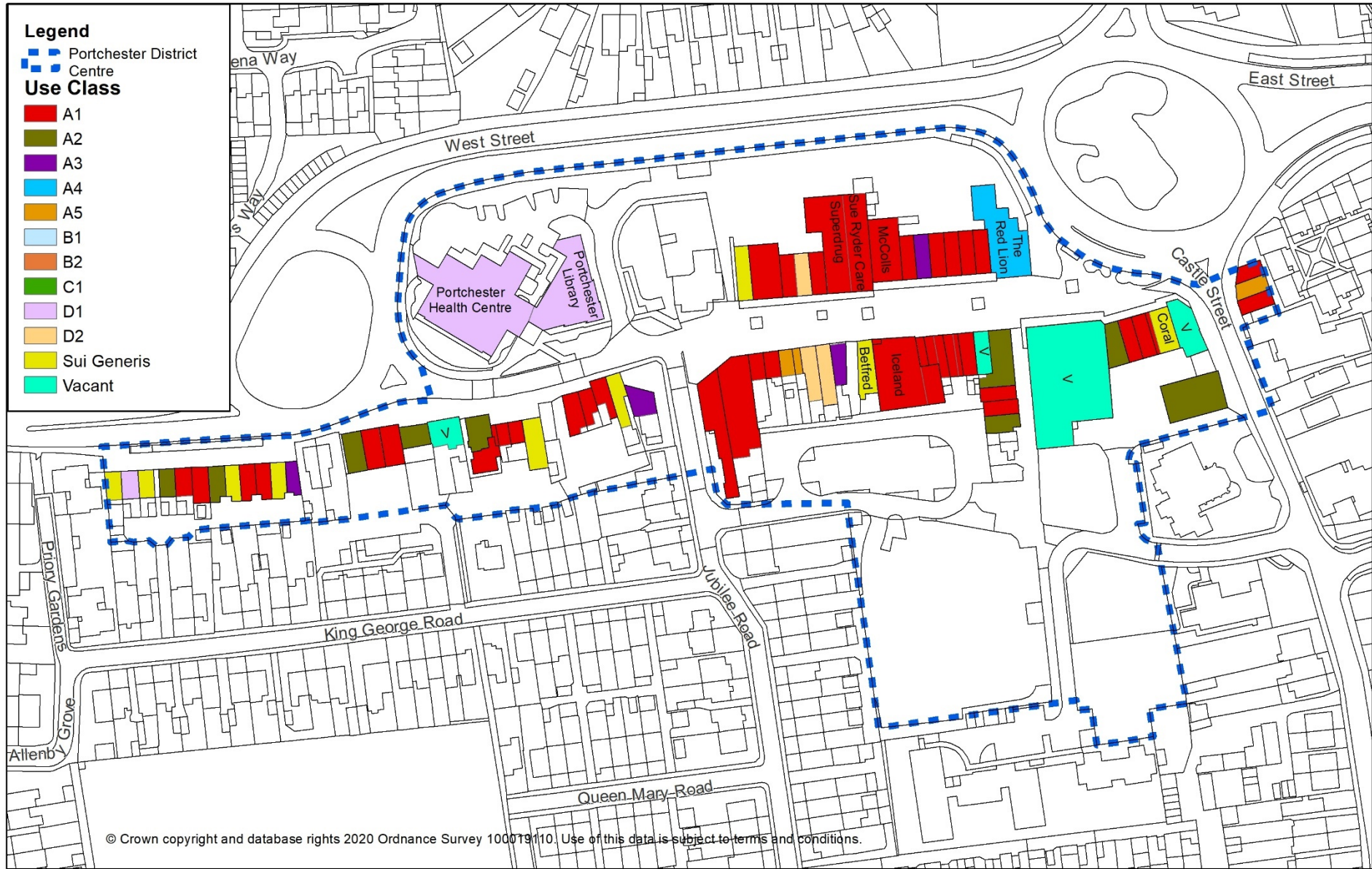
Chart 2: Portchester District Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	70	+1		10,334
Occupied	66	+3	94.3	8,900
Vacant	4	-2	5.7	1,434
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	35	+3	53.0	4,418
A2	9	-1	13.6	1,033
A3	4	0	6.1	292
A4	1	0	1.5	397
A5	3	0	4.6	137
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	3	0	4.6	1,552
D2	2	+1	3.0	290
Sui Generis	9	0	13.6	781
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	1	0	1.5	100
Clothing	2	+1	3.0	143
Convenience	4	-1	6.1	772
Eating Out	8	0	12.1	825
Home & Electronics	3	+1	4.6	372
Mixed Retail	7	0	10.6	1,408
Other	4	0	6.1	839
Recreation	8	0	12.1	710
Services	14	-1	21.2	1,469
Wellness	15	+2	22.7	2,262

Table 6: Portchester District Centre Ground Floor Unit Occupancy

Policy Monitoring

Current unit occupancy complies with Policy DSP34, as the majority of units are occupied for retail uses. Policy DSP36: Portchester District Centre relates to new development in Portchester District Centre. Future Retail Health Checks and the Authority Monitoring Report will provide an update as and when proposals for new development in the centre come forward.



Portchester District Centre -
Summer 2020

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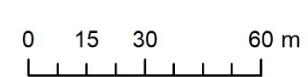
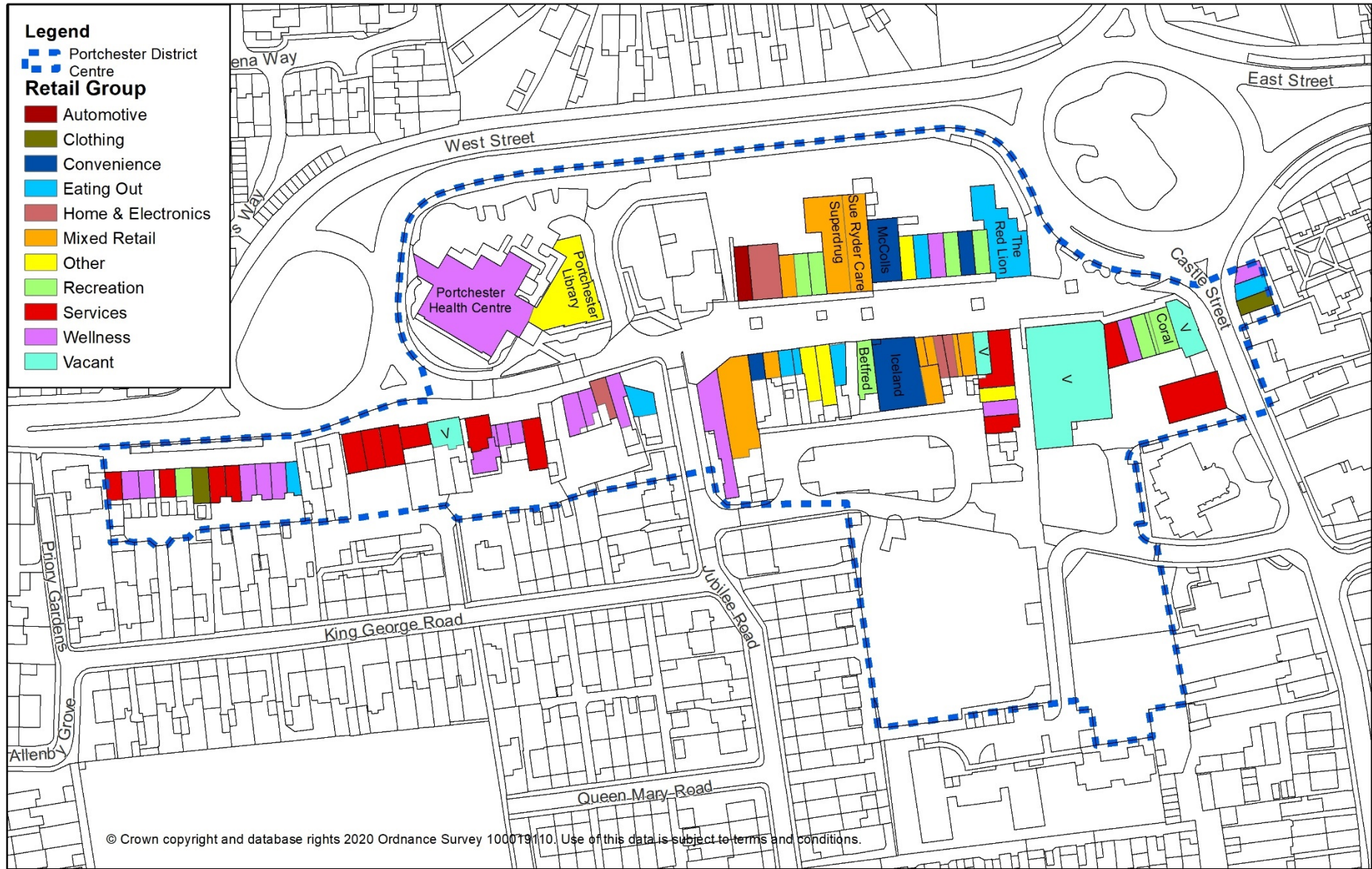


Figure 3: Portchester District Centre Use Classes



Portchester District Centre -
Summer 2020

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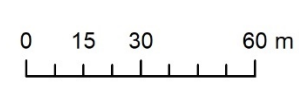


Figure 4: Portchester District Centre Retail Groups

Locks Heath District Centre

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

In Locks Heath District Centre, all units are occupied. A1 shops account for over 56% of units and 69% of the floorspace (6,496 sqm), with nearly half the floorspace being used for 'Mixed Retail' goods. Since the 2019 Retail Health Check the centre has seen the addition of a play centre/café which follows the trend for new recreation venues in retail centres.

Similar to Portchester District Centre, Locks Heath District Centre provides residents with a choice for their daily convenience needs but is not a main shopping destination for comparison goods. It continues to be a stable and well used centre.

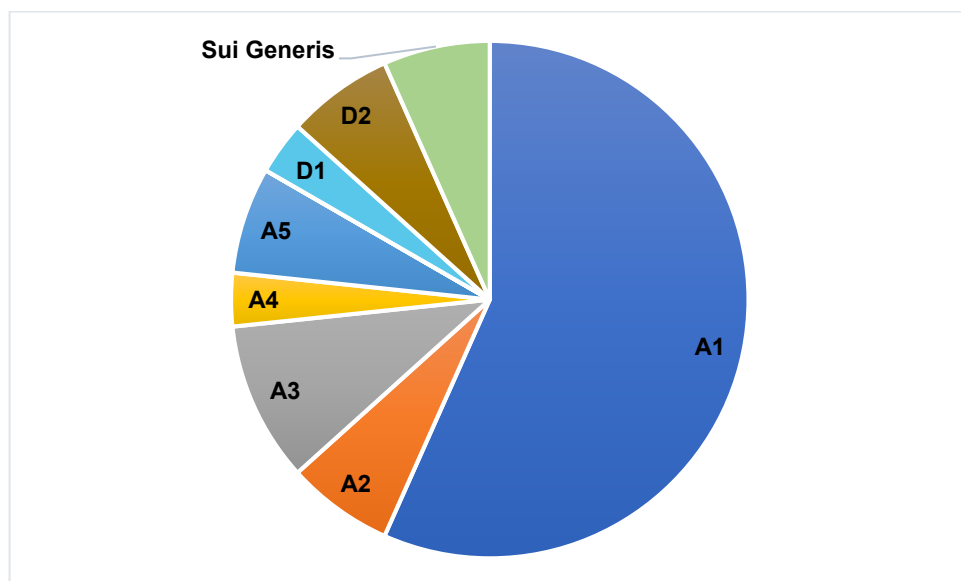


Chart 3: Locks Heath District Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	30	+1		9,364
Occupied	30	+3	100	9,364
Vacant	0	-2	0	0
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	17	+1	56.6	6,496
A2	2	0	6.7	268
A3	3	0	10.0	490
A4	1	0	3.3	300
A5	2	0	6.7	442
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	1	0	3.3	247
D2	2	+1	6.7	576
Sui Generis	2	+1	6.7	545
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	0	0	0.0	0
Convenience	7	+1	23.3	1,223
Eating Out	6	0	20.0	1,232
Home & Electronics	0	0	0.0	0
Mixed Retail	5	+1	16.7	4,421
Other	4	0	13.3	1,029
Recreation	2	+1	6.7	452
Services	3	0	10.0	386
Wellness	3	0	10.0	621

Table 7: Locks Heath District Centre Ground Floor Unit Occupancy

Policy Monitoring

Current unit occupancy complies with Policy DSP34 as the majority of units are occupied for A1 retail uses. Policy DSP35: Locks Heath District Centre identifies the potential for the Centre to accommodate up to 2,000 sqm of additional convenience floorspace and additional cafes, restaurants and comparison retail units of a scale appropriate to the district centre. Since the summer 2019 survey, 300 sqm of floorspace has been developed. Future Retail Health Checks will continue to monitor the situation and provide updates as appropriate.



Figure 5: Locks Heath District Centre Use Classes

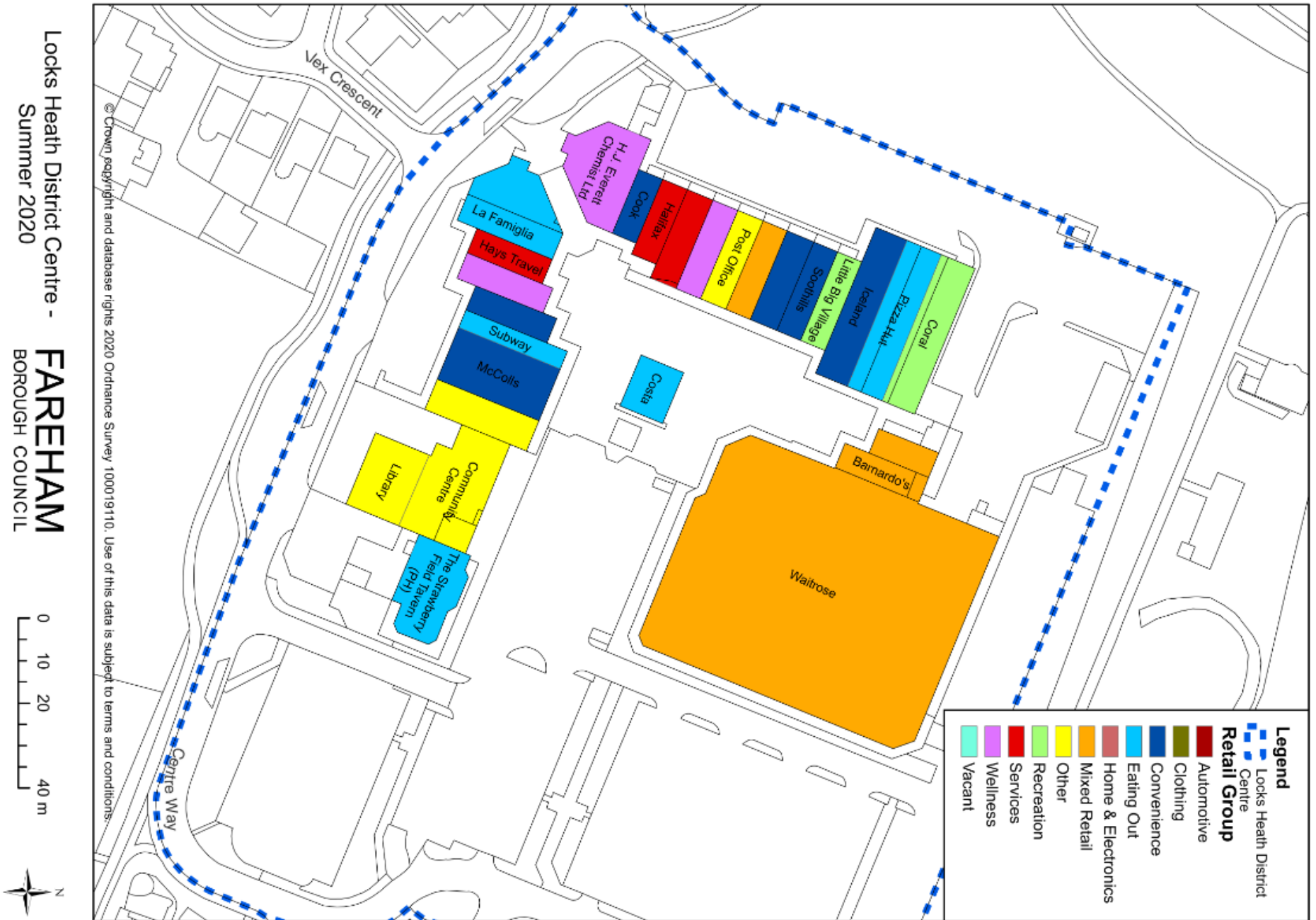


Figure 6: Locks Heath District Centre Retail Groups

Stubbington Local Centre

Stubbington Local Centre is located in the south of Fareham Borough, built around a small green and serves both Stubbington and Hill Head.

Of the 44 units in the centre, 41 are occupied, a drop from the 100% occupancy rate in 2019. The centre predominantly consists of A1 uses; 70.8% of occupied units and 71.9% of floorspace. The losses have been in the services and wellness retail groups

The centre remains home to a diverse range of retail groups that satisfy many customer needs and ensure the centre's sustainability as a place to come for a variety of goods and services, including high street chains such as the Coop, Iceland and Costa.

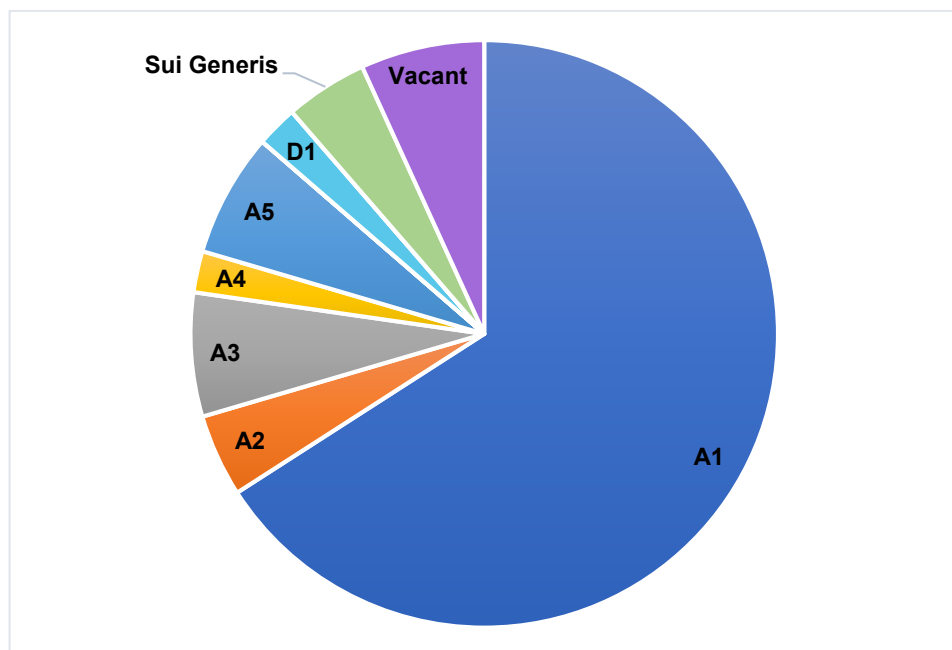


Chart 4: Stubbington Local Centre Distribution of Floorspace by Use Class

Policy Monitoring

Current unit occupancy within Stubbington Local Centre complies with Policy DSP34 as A1 retail is the dominant use class.

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	44	0		5,578
Occupied	41	-3	93.1	5,383
Vacant	3	+3	6.9	195
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	29	0	70.8	3,847
A2	2	-2	4.9	172
A3	3	0	7.3	303
A4	1	0	2.4	487
A5	3	0	7.3	187
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	1	0	2.4	134
D2	0	0	0.0	0
Sui Generis	2	-1	4.9	253
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	2	0	4.9	126
Convenience	7	0	17.1	1,665
Eating Out	7	0	17.1	977
Home & Electronics	1	0	2.4	99
Mixed Retail	7	0	17.1	1,003
Other	3	0	7.3	354
Recreation	1	0	2.4	104
Services	6	-2	14.6	372
Wellness	7	-1	17.1	683

Table 8: Stubbington Local Centre Ground Floor Unit Occupancy



Legend	
	Stubbington Local Centre
	A1
	A2
	A3
	A4
	A5
	B1
	B2
	C1
	D1
	D2
	Sui Generis
	Vacant

Figure 7: Stubbington Local Centre Use Classes



Stubbington Local Centre -
Summer 2020

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Figure 8: Stubbington Local Centre Retail Groups

Park Gate Local Centre

Park Gate Local Centre is situated in the west of the Borough, near Swanwick train station and the M27. It is the third largest centre in the Borough with a total of 57 units and 6,879 sqm floorspace. Only a mile north of Locks Heath District Centre, Park Gate Local Centre provides a different offer. It is more orientated towards 'Services', which make up over 50% of the occupied units and 2,441 sqm floorspace. A high proportion of the units are for A1 (33.8%) and A2 (41.5%). Since the 2019 Retail Health Check one vacant unit has been converted into a residential dwelling and one vacant unit has been filled by a craft brewery.

Despite being mostly service driven, the Centre does have two important convenience/mixed use stores; the Co-op (230 sqm) and Sainsbury's Local (725 sqm), which provide local residents with daily necessities.

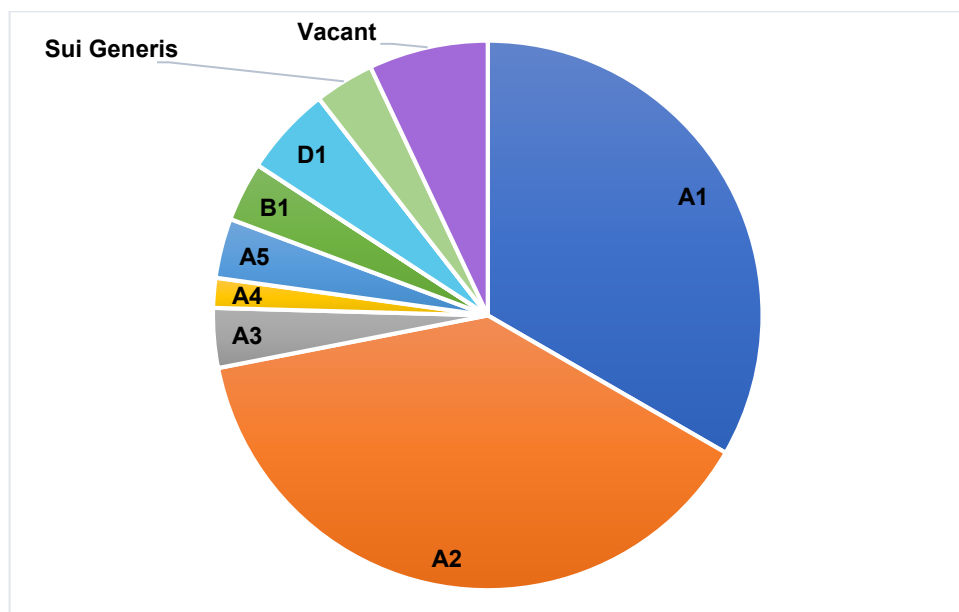


Chart 5: Park Gate Local Centre Distribution of Floorspace by Use Class

Policy Monitoring

It is recognised that Park Gate is predominantly Service (A2) based and has large groupings of non-retail uses, although there remains more A1 floorspace than that occupied by A2 uses. The Centre remains compliant with Policy DSP34 through the overall active street frontages.

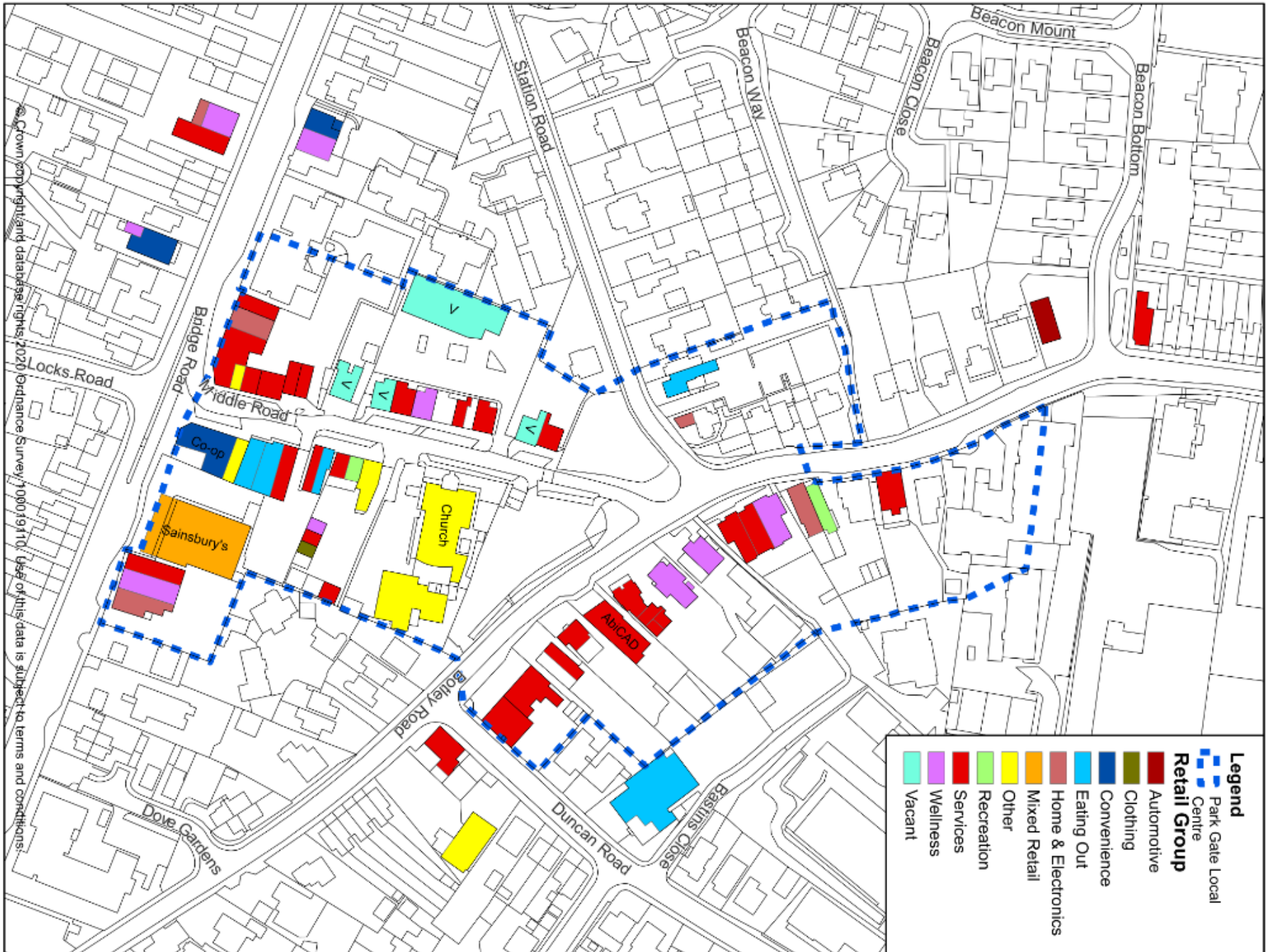
	Number of units	Change since 2019	% of total units	Floorspace (sqm)
Total	57	-1		6,879
Occupied	53	+1	93.0	6,133
Vacant	4	-2	7.0	746
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	19	0	35.8	2,465
A2	22	0	41.5	1,888
A3	2	0	3.8	169
A4	1	+1	1.9	81
A5	2	0	3.8	236
B1	2	0	3.8	293
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	3	0	5.6	861
D2	0	0	0.0	0
Sui Generis	2	0	3.8	140
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	1	0	1.9	27
Convenience	1	0	1.9	229
Eating Out	5	0	9.4	485
Home & Electronics	4	0	7.5	391
Mixed Retail	1	0	1.9	725
Other	5	0	9.4	1,049
Recreation	2	0	3.8	129
Services	28	0	52.8	2,441
Wellness	6	0	11.3	657

Table 9: Park Gate Local Centre Ground Floor Unit Occupancy



Figure 9: Park Gate Local Centre Use Classes

Park Gate Local Centre -
FAREHAM
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 Summer 2020



Legend

- ▬ Park Gate Local Centre
- ▬ Retail Group
- Automotive
- Clothing
- Convenience
- Eating Out
- Home & Electronics
- Mixed Retail
- Other
- Recreation
- Services
- Wellness
- Vacant

Figure 10: Park Gate Local Centre Retail Groups

Broadlaw Walk Local Centre

Broadlaw Walk is a Local Centre situated to the south-west of Fareham Town Centre, it serves local people from the surrounding residential areas. It is a small centre with just eight units. At the time of the 2020 Retail Health Check there was one vacancy following the closure of a community art studio. A1 is the dominant use class in terms of total floorspace at 3 units and 745 sqm floorspace.

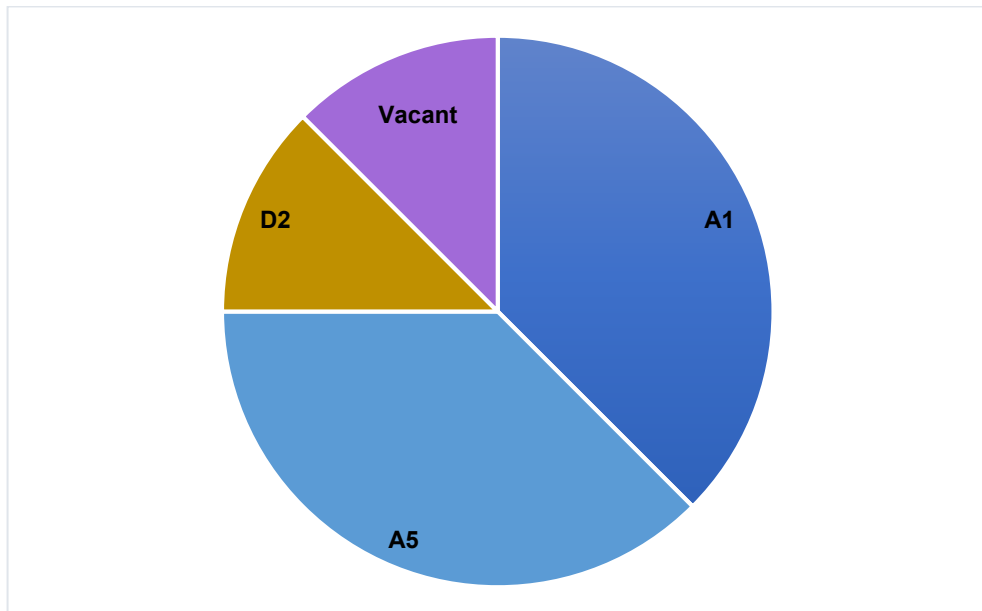


Chart 6: Broadlaw Walk Local Centre Distribution of Floorspace by Use Class

Policy Monitoring

The current occupancy within Broadlaw Walk Local Centre is compliant with Policy DSP34 due to A1 retail use being the dominant use class in terms of floorspace.

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	8	0		1,633
Occupied	7	0	87.5	1,541
Vacant	1	+1	12.5	92
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	3	0	42.9	745
A2	0	0	0.0	0
A3	0	0	0.0	0
A4	0	0	0.0	0
A5	3	0	42.9	444
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	0	0	0.0	0
D2	1	-1	14.2	352
Sui Generis	0	0	0.0	0
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	0	0	0.0	0
Convenience	1	0	14.2	374
Eating Out	3	0	42.9	444
Home & Electronics	0	0	0.0	0
Mixed Retail	0	0	0.0	0
Other	1	-1	14.2	352
Recreation	0	0	0.0	0
Services	0	0	0.0	0
Wellness	2	0	28.7	371

Table 10: Broadlaw Walk Local Centre Ground Floor Unit Occupancy

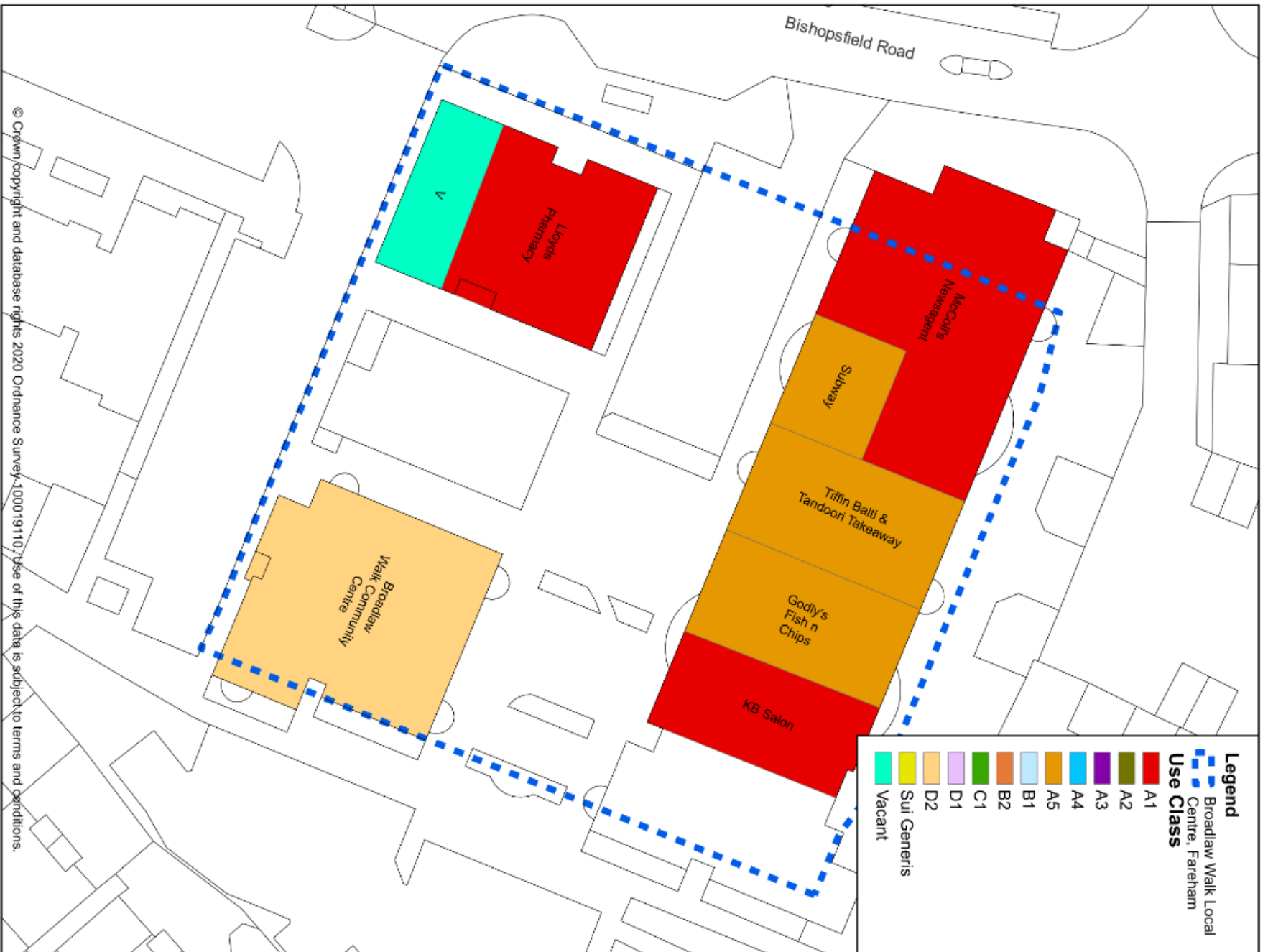


Figure 11: Broadlaw Walk Local Centre Use Classes



Figure 12: Broadlaw Walk Local Centre Retail Groups

Highlands Road Local Centre

Highlands Road Local Centre is located to the north west of Fareham Town Centre. All 19 units and 2,543 sqm floorspace were occupied at the time of the summer 2020 Retail Health Check. A1 is the dominant use class in the Centre making up over 52% of all units and 67% of total floorspace (1,706 sqm). In terms of the retail groups, 'Eating Out' accounts for over a third of all units at 36.8%. There have been no changes in any of the units since the 2019 Retail Health Check indicating that the centre is relatively stable and successful.

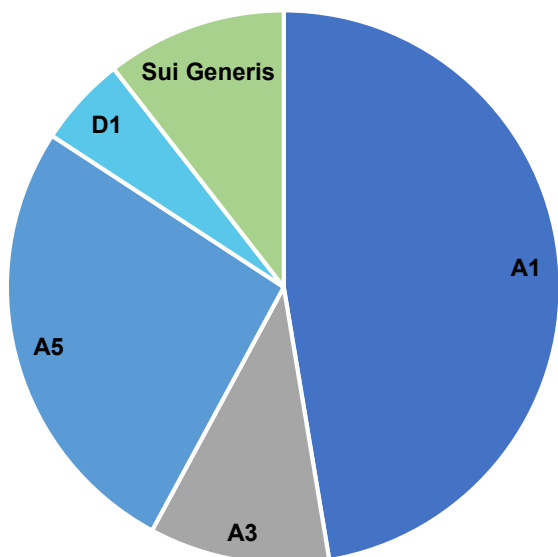


Chart 7: Highlands Road Local Centre Distribution of Floorspace by Use Class

Policy Monitoring

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

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	19	0		2,543
Occupied	19	0	100	2,543
Vacant	0	0	0	0
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	9	0	52.6	1,706
A2	0	0	0.0	0
A3	2	0	5.3	160
A4	0	0	0.0	0
A5	5	0	26.3	369
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	1	0	5.3	60
D2	0	0	0.0	0
Sui Generis	2	0	10.5	248
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	0	0	0.0	0
Convenience	3	0	15.8	965
Eating Out	7	0	36.8	529
Home & Electronics	0	0	0.0	0
Mixed Retail	1	0	5.3	172
Other	1	0	5.3	60
Recreation	2	0	10.5	206
Services	1	0	5.3	88
Wellness	4	0	21.1	523

Table 11: Highlands Road Local Centre Ground Floor Unit Occupancy

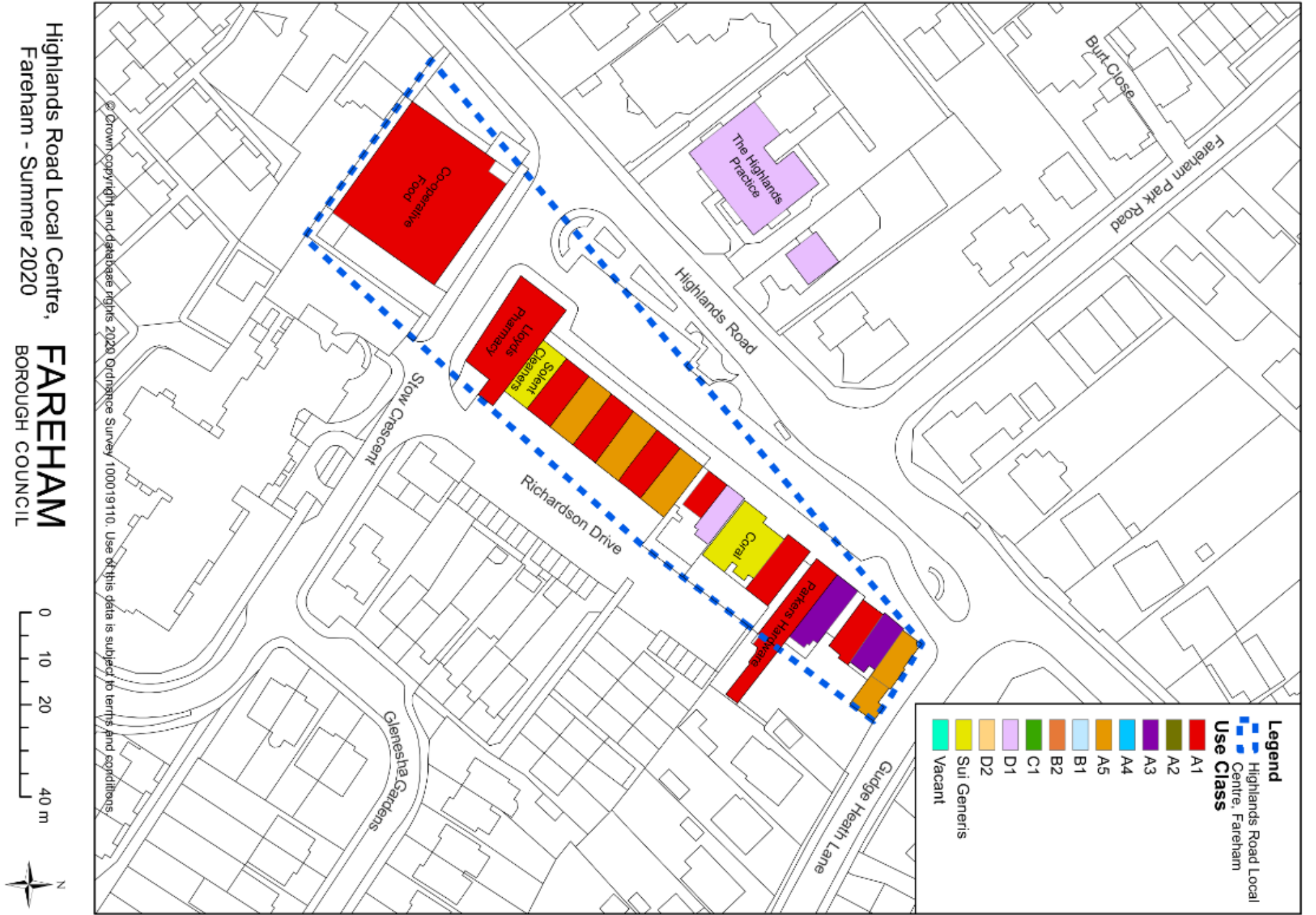


Figure 13: Highlands Road Local Centre Use Classes

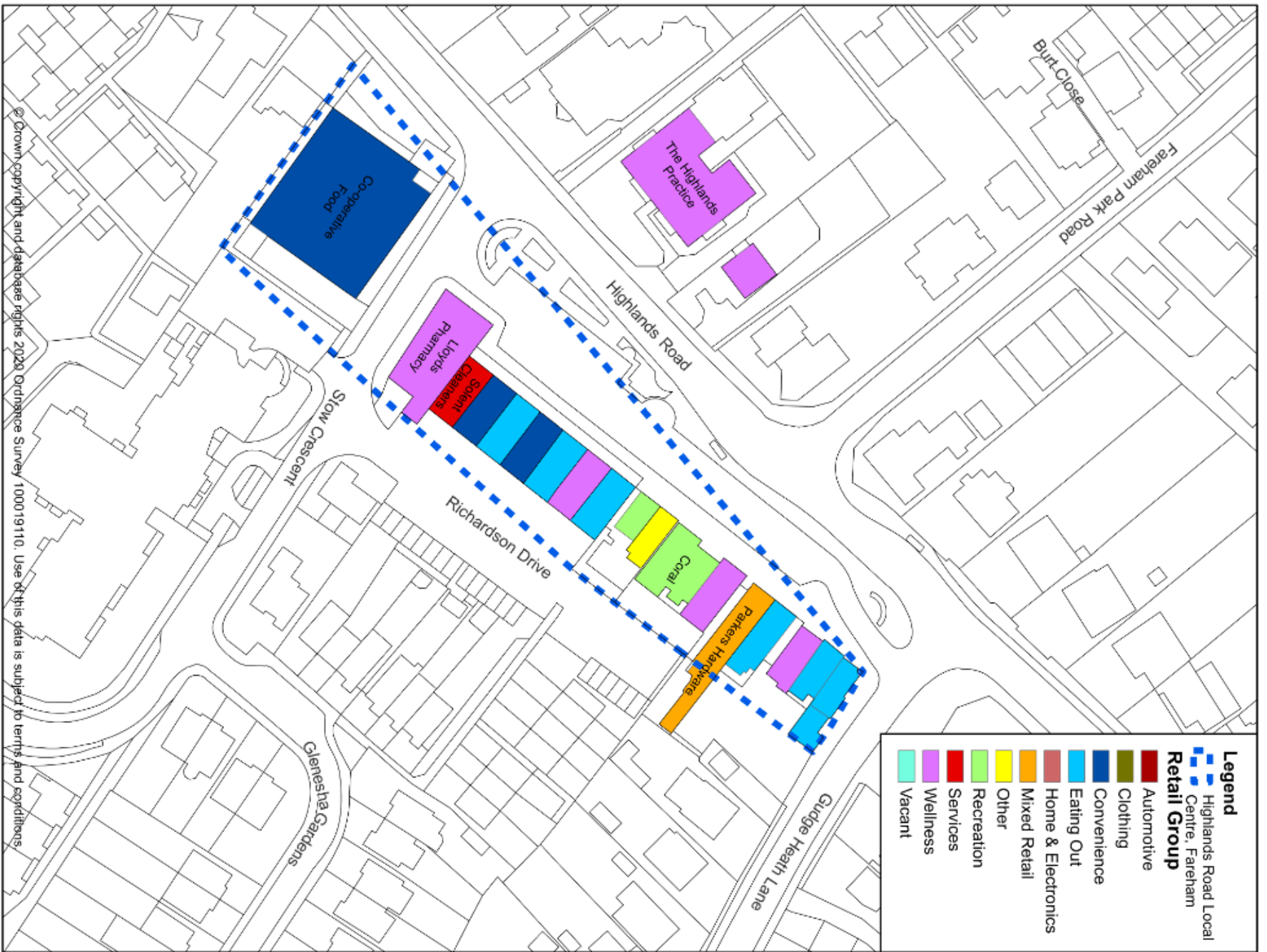
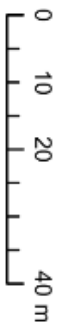


Figure 14: Highlands Road Local Centre Retail Groups

Gull Coppice Local Centre

Gull Coppice Local Centre is situated in Whiteley, in the north of the Borough. At the time of the 2020 Retail Health Check there were no vacant units. A1 is the dominant use class in terms of the number of units, at 33.3%, however A1 only represents 19% (376 sqm) of floorspace. D use classes are dominant in terms of floorspace at 790 sqm (69.1%) due to the largest units in the Centre being a community centre (D2) and a children's nursery (D1). In terms of the retail groups, 'Wellness' is most dominant, accounting for a third of all units. There have been no changes in any of the units since the 2019 Retail Health Check indicating that the centre is stable and successful.

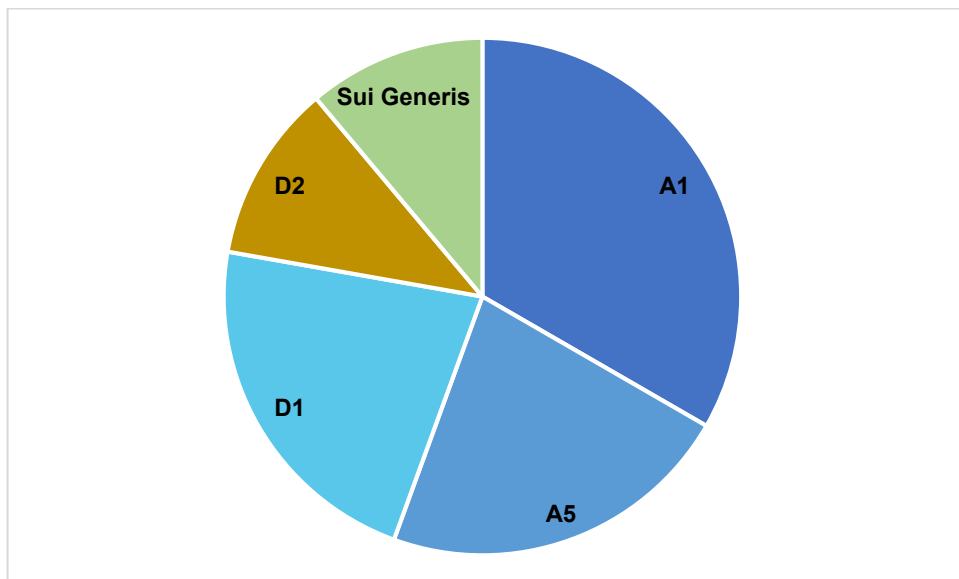


Chart 8: Gull Coppice Local Centre Distribution of Floorspace by Use Class

Policy Monitoring

Whilst A1 is not the dominant use class in terms of floorspace, it is the most dominant in terms of total number of units. However, as there is only one more A1 unit compared to A5, the balance could easily be tipped.

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	9	0		1,955
Occupied	9	0	100	1,955
Vacant	0	0	0	0
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	3	0	33.3	376
A2	0	0	0.0	0
A3	0	0	0.0	0
A4	0	0	0.0	0
A5	2	0	22.2	199
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	2	0	22.2	790
D2	1	0	11.1	561
Sui Generis	1	0	11.1	29
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	0	0	0.0	0
Convenience	1	0	11.1	269
Eating Out	2	0	22.2	199
Home & Electronics	0	0	0.0	0
Mixed Retail	0	0	0.0	0
Other	2	0	22.2	589
Recreation	0	0	0.0	0
Services	1	0	11.1	428
Wellness	3	0	33.3	469

Table 12: Gull Coppice Local Centre Ground Floor Unit Occupancy

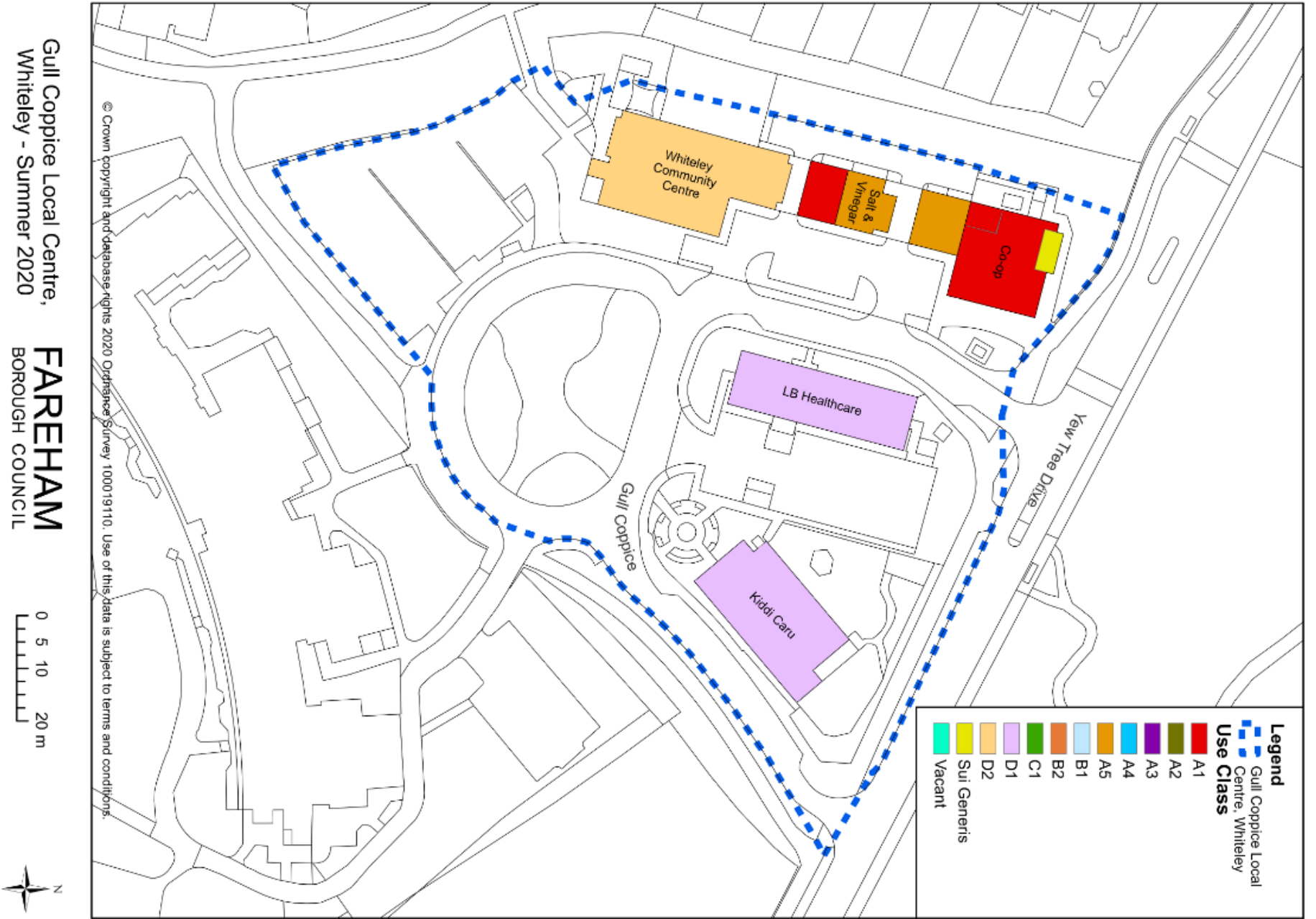


Figure 15: Gull Coppice Local Centre Use Classes

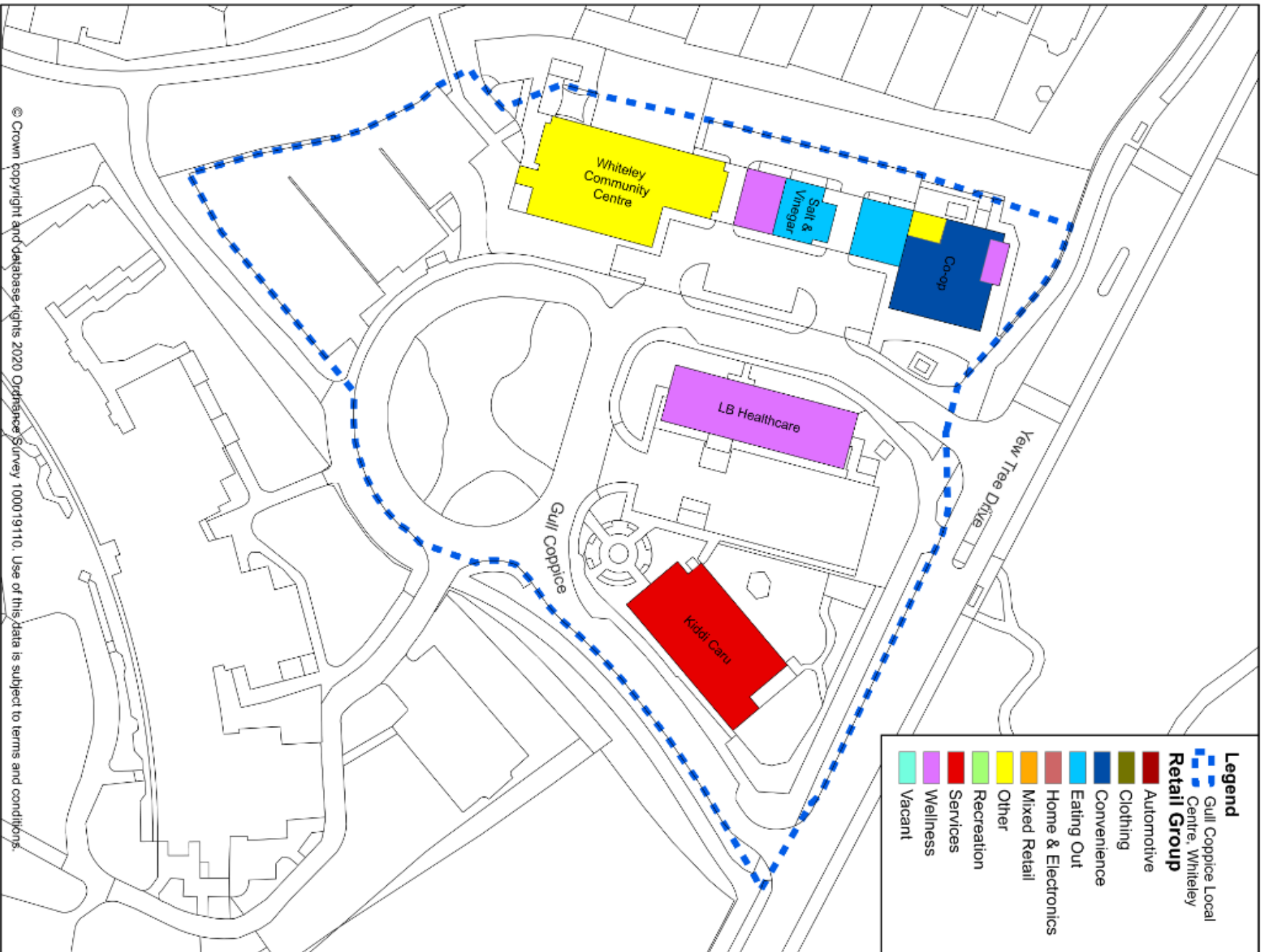
Gull Coppice Local Centre,
Whiteley - Summer 2020

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Legend	
	Gull Coppice Local Centre, Whiteley
	Retail Group
	Automotive
	Clothing
	Convenience
	Eating Out
	Home & Electronics
	Mixed Retail
	Other
	Recreation
	Services
	Wellness
	Vacant

Figure 16: Gull Coppice Local Centre Retail Groups

Titchfield Local Centre

Titchfield Local Centre is located in the centre of the borough. There were no vacancies at the time of the summer 2020 Retail Health Check. A1 is the dominant use class with over 54% of units. In terms of the retail groups there is a good variety, 'Eating Out' and 'Wellness' account for 25% and 29% respectively of the units with 'Convenience' and 'Services' at 12.5% each. In terms of floorspace, A1 is still the most dominant use class at 1,248 sqm floorspace representing 50.3% of total floorspace. However, despite only making up 8.3% of the total units, the second highest proportion of floorspace is A4 (599 sqm) due to the two largest units in the local centre, the Bugle Hotel and the Queens Head Pub, both being use class A4. The lack of vacancies indicates the centre is stable and successful.

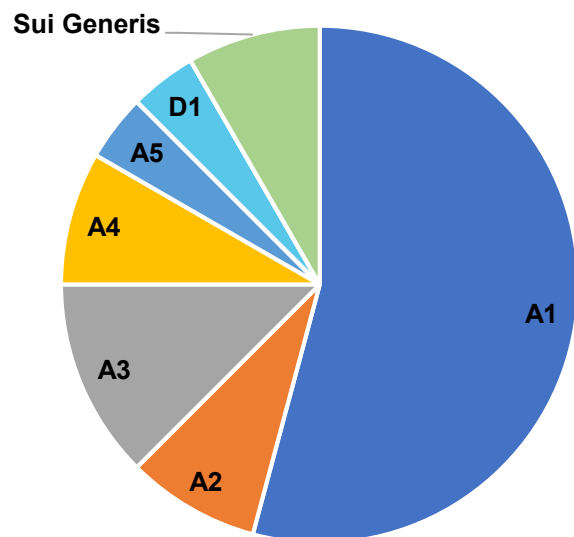


Chart 9: Titchfield Local Centre Distribution of Floorspace by Use Class

Policy Monitoring

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

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	24	0		2,479
Occupied	24	+1	100	2,479
Vacant	0	-1	0	0
Use Class	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
A1	13	0	54.2	1,248
A2	2	0	8.3	116
A3	3	+1	12.5	161
A4	2	-1	8.3	599
A5	1	0	4.2	112
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	1	+1	4.2	139
D2	0	0	0.0	0
Sui Generis	2	0	8.3	104
Retail Group	No. of units	Change since 2019	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	2	+1	8.3	121
Convenience	3	-1	12.5	451
Eating Out	6	0	25.0	873
Home & Electronics	0	0	0.0	0
Mixed Retail	2	0	8.3	291
Other	1	0	4.2	100
Recreation	0	0	0.0	0
Services	3	0	12.5	200
Wellness	7	+1	29.2	443

Table 13: Titchfield Local Centre Ground Floor Unit Occupancy



Figure 17: Titchfield Local Centre Use Classes

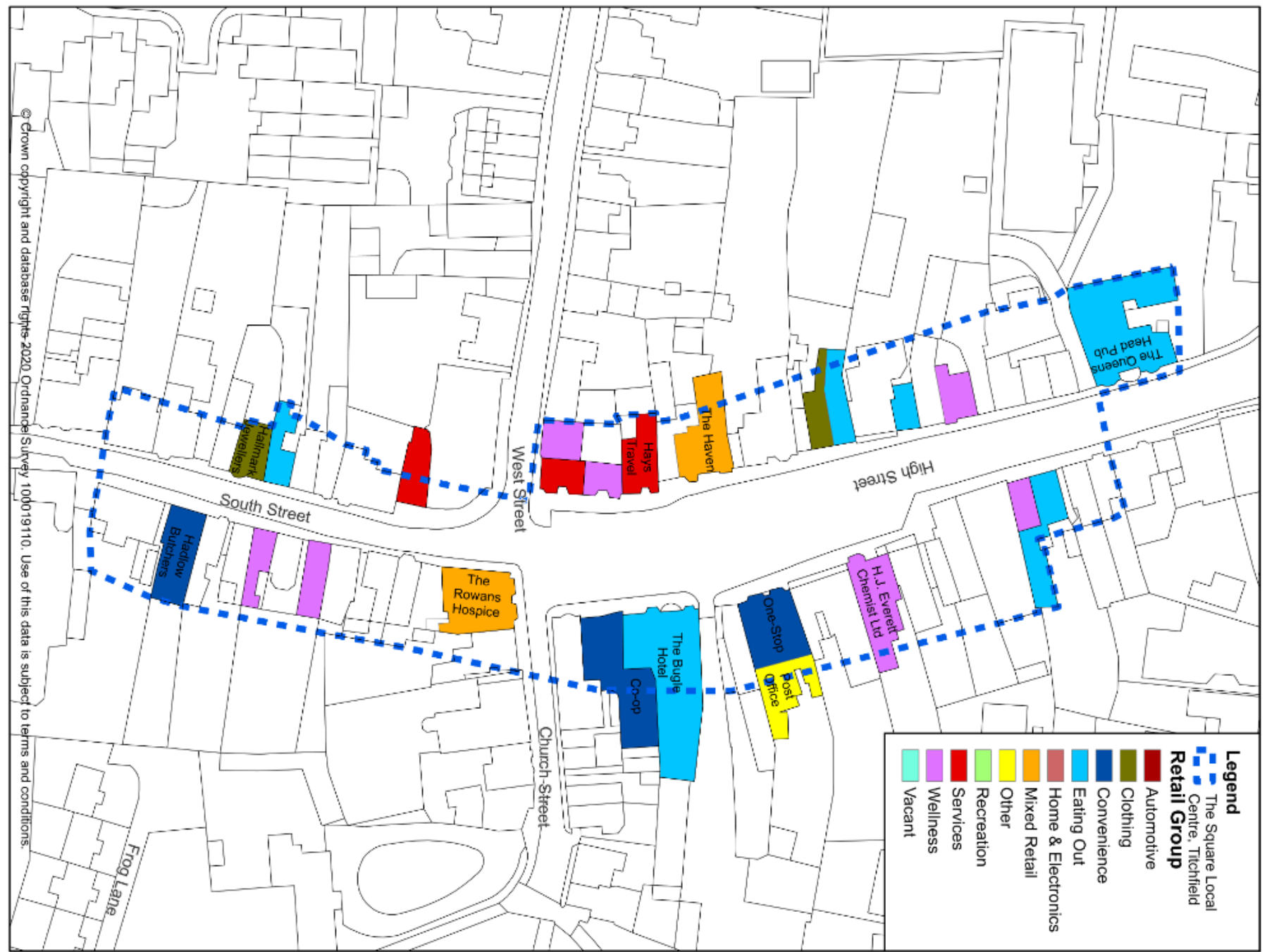


Figure 18: Titchfield Local Centre Retail Groups

Warsash Local Centre

Warsash Local Centre is situated in the west of the Borough and east of the River Hamble. The Centre comprises 3,017 sqm floorspace and at the time of the 2020 Retail Health Check there were no vacant units in the Centre. There has been an increase of 1 unit to the centre, following the division of an existing unit. A1 occupies the highest percentage of units (47.8%) in the centre and the largest amount of floorspace (1,219 sqm) of the use classes. This is closely followed by Sui Generis (919 sqm) due to 2 large units which are occupied by automotive retail group, as by their nature, car sales require large floorspace. In terms of the retail groups most of the units are 'Wellness' (30.4%), 'Services' (21.8%) or 'Eating Out' (17.5%). The lack of vacancies indicates that the centre remains stable and successful.

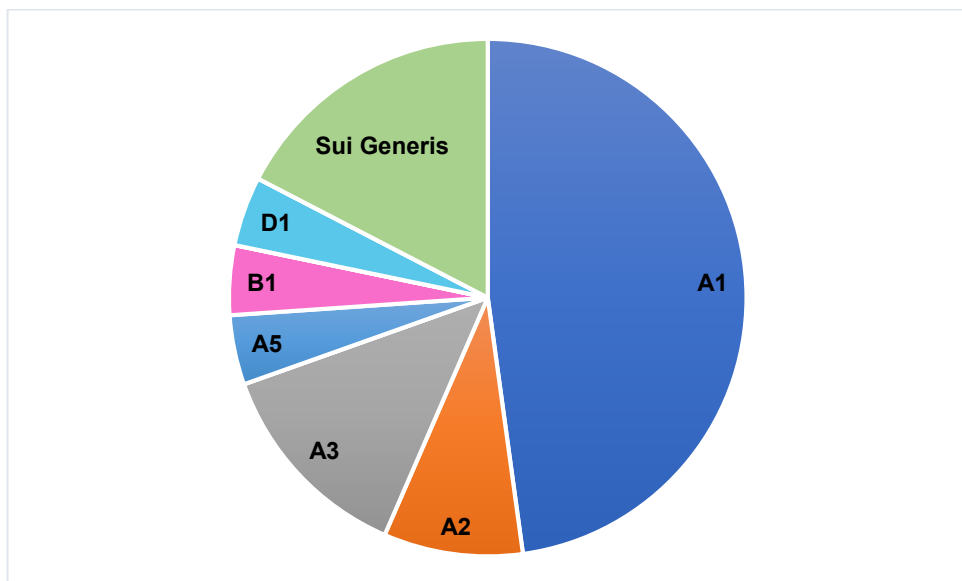


Chart 10: Warsash Local Centre Distribution of Floorspace by Use Class

Policy Monitoring

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

	No. of units	Change since 2019	% of total units	Floorspace (sqm)
Total	23	+1		3,017
Occupied	23	+1	100	3,017
Vacant	0	0	0	0
Use Class	No. of units	Change since 2019	% of occupied units	Floorspace (sqm)
A1	11	0	47.8	1,219
A2	2	0	8.7	420
A3	3	0	13.1	247
A4	0	0	0.0	0
A5	1	0	4.3	84
B1	1	0	4.3	48
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	1	+1	4.3	80
D2	0	0	0.0	0
Sui Generis	4	0	17.5	919
Retail Group	No. of units	Change since 2019	% of occupied units	Floorspace (sqm)
Automotive	2	0	8.7	828
Clothing	1	-1	4.3	130
Convenience	2	+1	8.7	411
Eating Out	4	0	17.5	331
Home & Electronics	1	0	4.3	103
Mixed Retail	0	0	0.0	0
Other	0	0	0.0	0
Recreation	1	0	4.3	83
Services	5	0	21.8	590
Wellness	7	+1	30.4	541

Table 14: Warsash Local Centre Ground Floor Unit Occupancy



Figure 19: Warsash Local Centre Use Classes



Figure 20: Warsash Local Centre Retail Groups

Fareham Town Centre: Footfall Count

Method

Footfall counts are taken to understand the trend in the number of people visiting Fareham Town Centre. Footfall counts are collected at the eleven locations identified in Figure 21. These locations were selected because they represent the main entry and exit points to Fareham Town Centre. Some locations are strategically placed to monitor footfall between transport nodes and the Town Centre. For example, location 6 is between the multi-storey car park and the shopping centre and location 11 is between the bus station and West Street. The count surveys indicate the retail health of different parts of the Primary and Secondary Shopping Areas, as well as two areas outside these main shopping areas (locations 1 and 9).

The footfall surveys were conducted on Monday 22nd, Thursday 25th and Saturday 27th June 2020; illustrating the level of pedestrian flow on Fareham's weekly market day, a regular weekday, and at the weekend. This enables analysis of these factors on footfall counts over the years. All counts were undertaken between 10am and 12 noon.

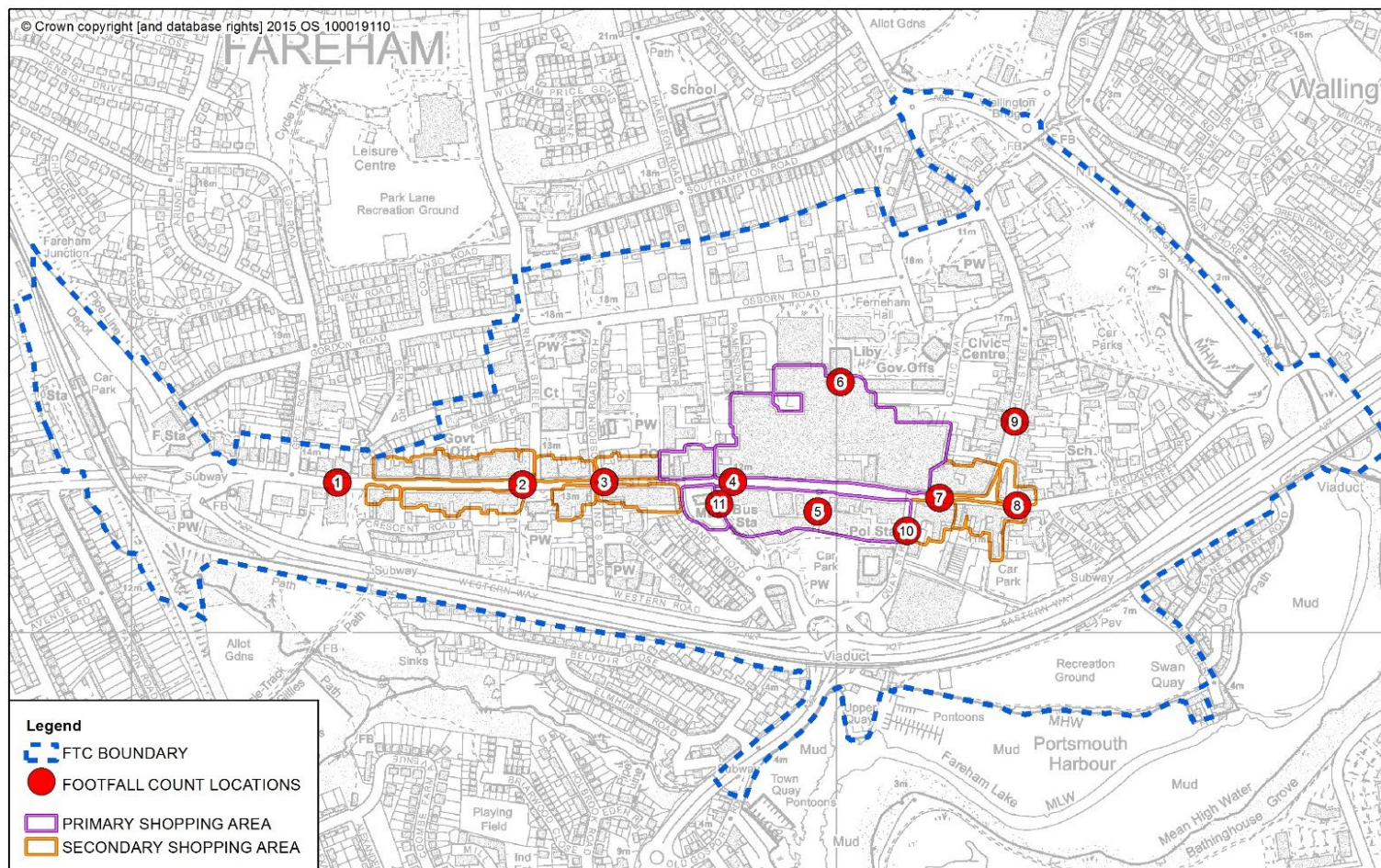


Figure 21: Footfall Count Locations - Fareham Town Centre

Analysis

Overall, there has been a decrease in footfall in Fareham Town Centre since 2013. Figure 22 shows that the total footfall count was the lowest since monitoring began. The total footfall count over the three days was 31,834 in 2013, this had decreased to 19,344 in 2019, a drop of 39.2%. In 2020 the footfall was considerably lower again at 10,068 over 3 days, a drop of 48%. Whilst it is acknowledged that there has been a downward trend in high street retail, the figures for 2020 have undoubtedly been impacted by the Covid-19 pandemic.

In terms of analysing daily footfall figures, the Saturday count had shown a downward trend since 2013. The footfall for Saturday in 2020 was significantly down, being even lower than the regular weekday footfall. This is likely in part due to the weather on Saturday 27th June 2020, which was particularly poor, with persistent heavy rain during the survey time period.

The change in footfall on market day since the spike in 2016 has been significant, with a drop of 48.8% from 11,652 to 5,964 in 2019. The 2020 figures have seen a further decrease in footfall between 2019 and 2020 for market day to 4,824, a drop of 19%. However, this is a significantly smaller decrease than that seen in the both the Saturday figures and the regular weekday figures for 2020, which saw drops in footfall of 63% and 58% respectively, suggesting that the market has proven to be a significant draw this year.



Empty town centre 2020

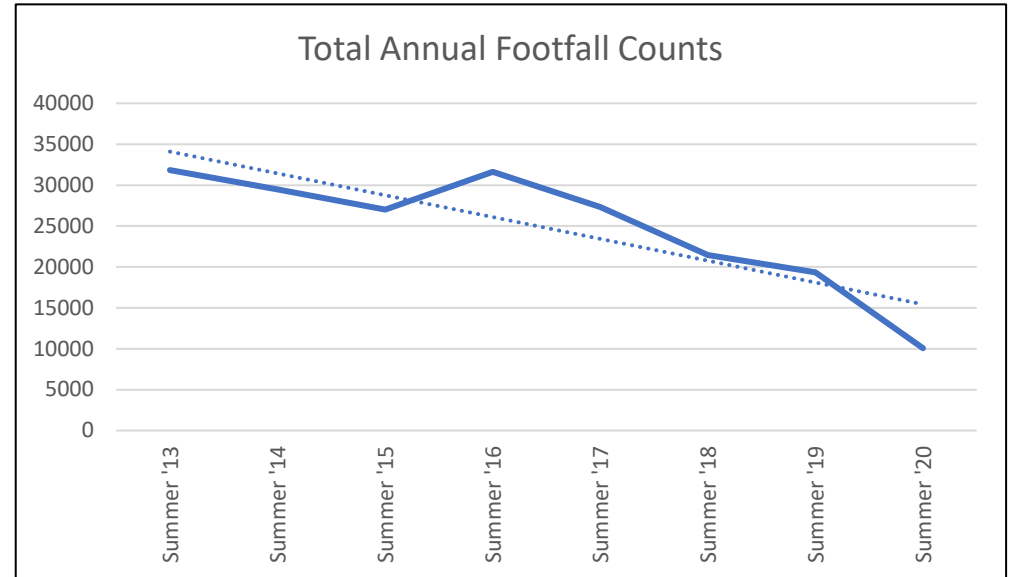


Figure 22: Fareham Town Centre Total Annual Footfall

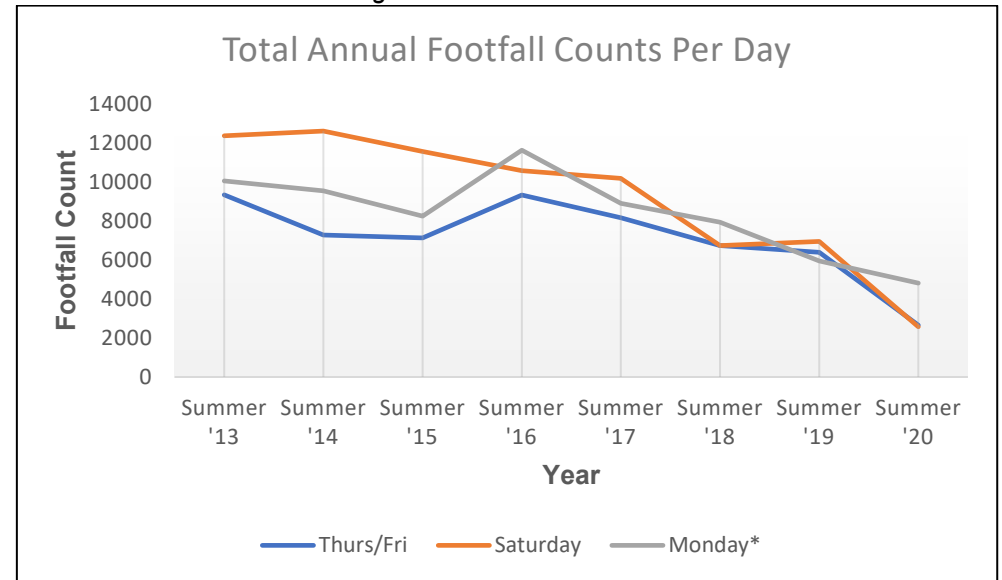


Figure 23: Fareham Town Centre Total Annual Footfall by Day

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 84	W: 180	264
2	E: 120	W: 144	264
3	E: 216	W: 216	432
4	E: 540	W: 636	1,176
5	N: 444	S: 288	732
6	N: 276	S: 444	720
7	E: 192	W: 252	444
8	E: 72	W: 48	120
9	N: 120	S: 60	180
10	N: 60	S: 192	252
11	N: 60	S: 180	240

Table 15: Fareham Town Centre Footfall count per hour: Monday 22nd June 2020

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 60	W: 24	84
2	E: 108	W: 72	180
3	E: 84	W: 60	144
4	E: 324	W: 288	612
5	N: 216	S: 228	444
6	N: 144	S: 264	408
7	E: 48	W: 72	120
8	E:24	W:0	24
9	N: 72	S: 60	132
10	N: 120	S: 108	228
11	N: 96	S: 108	204

Table 17: Fareham Town Centre Footfall count per hour: Saturday 27th June 2020

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 60	W: 120	180
2	E: 60	W: 72	132
3	E: 72	W: 132	204
4	E: 216	W: 396	612
5	N: 132	S: 336	468
6	N: 96	S: 132	228
7	E: 84	W: 84	168
8	E: 60	W: 84	144
9	N: 72	S: 108	180
10	N: 108	S:48	156
11	N: 72	S: 120	192

Table 16: Fareham Town Centre Footfall count per hour: Thursday 25th June 2020

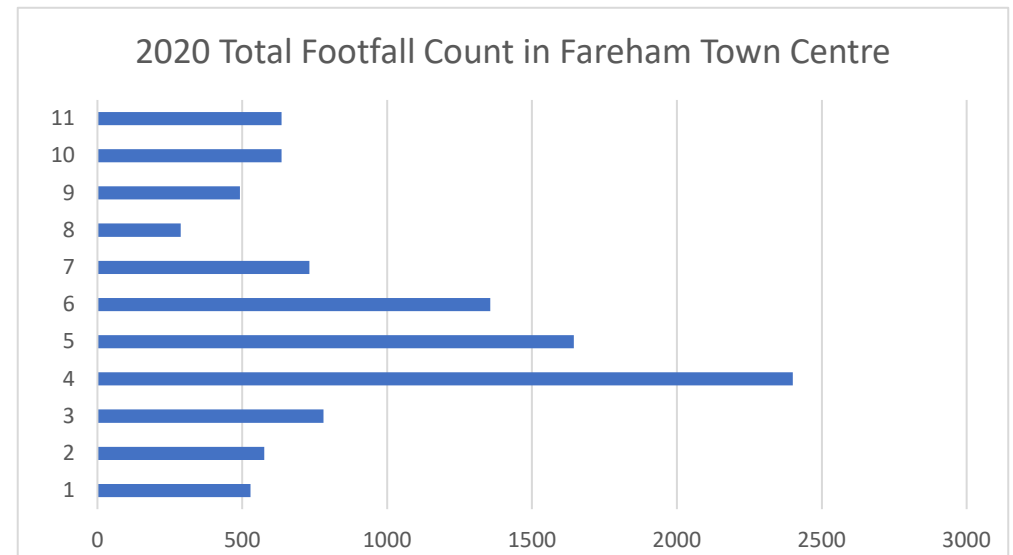


Figure 24: Fareham Town Centre Total Footfall Count at Each Location

Portchester District Centre: Footfall Count

Method

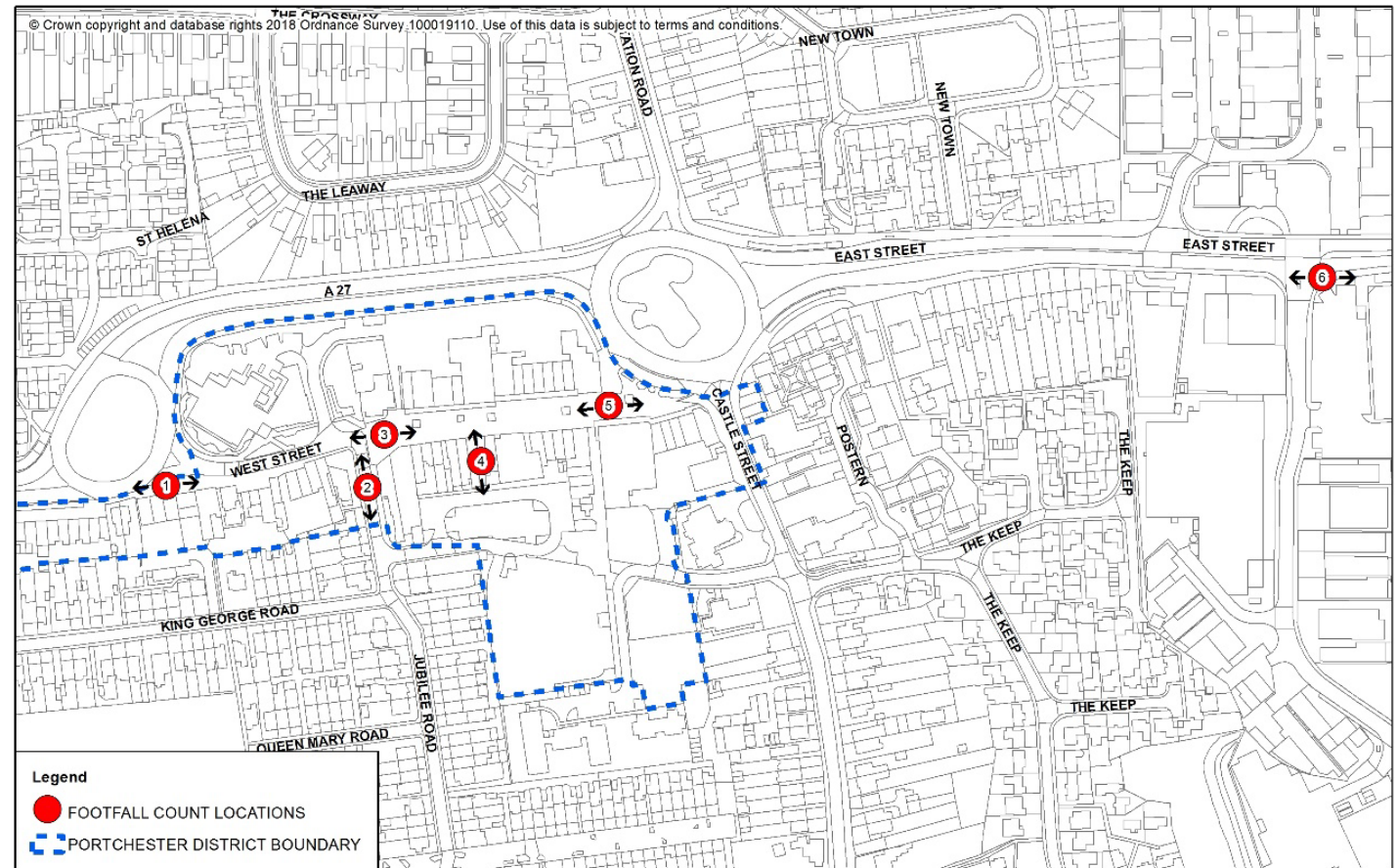
This is the third year that footfall surveys have been carried out in Portchester District Centre. Portchester is the second largest centre in the Borough and is identified as a regeneration area, therefore footfall data will be beneficial in gaining further insight into the retail health of the Centre. Footfall counts were taken at the six locations highlighted in Figure 25. These locations were selected because they represent the main entry and exit points to Portchester District Centre. For example, location 4 is a key walkway between the main car park and the Centre. Location 6 is strategically placed to monitor footfall between the shopping precinct and the Lidl supermarket on Southampton Road.

The footfall surveys were conducted on Wednesday 24th June, Thursday 25th June and Saturday 27th June 2020 in order to provide a broad illustration of the level of pedestrian flow on Portchester's weekly market day (Wednesday), a regular weekday and the weekend. This enables the footfall counts to be analysed within the context of these particular factors. All counts were undertaken between 10am and 12 noon.

Analysis

In terms of footfall analysis, Wednesday had significantly higher footfall than both Thursday and Saturday, illustrating the positive impact of the market on activity. However, in terms of overall footfall in the centre, when compared to

2019, there has been an overall decrease of 30% in 2020. In particular, the Saturday footfall saw a decrease from 1,476 to 828, a drop of 44%. This significant drop is due to the Covid-19 pandemic and the very poor weather conditions, with persistent rainfall during the data collection period.



Portchester District Centre Footfall Count Locations

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0 50 100 200 m



Figure 25: Footfall Count Locations: Portchester District Centre

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 120	W: 84	204
2	N: 24	S: 24	48
3	E: 204	W: 108	312
4	N: 180	S: 108	288
5	E: 144	W: 192	336
6	E:72	W:24	96

Table 18: Portchester District Centre Footfall count per hour: Wednesday 24th June 2020

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 12	W: 12	24
2	N: 60	S: 24	84
3	E: 72	W: 48	120
4	N: 156	S: 96	252
5	E: 132	W: 144	276
6	E:24	W: 72	96

Table 19: Portchester District Centre Footfall count per hour: Thursday 25th June 2020

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 84	W: 84	168
2	N: 12	S: 12	24
3	E: 60	W: 120	180
4	N: 168	S: 60	228
5	E: 120	W: 60	180
6	E: 24	W: 24	48

Table 20: Portchester District Centre Footfall count per hour: Saturday 27th June 2020

As the footfall count in Portchester has only been recorded for three years, there is not a longevity to the data, however this will provide a clearer picture of the retail health in Portchester District Centre moving forwards.

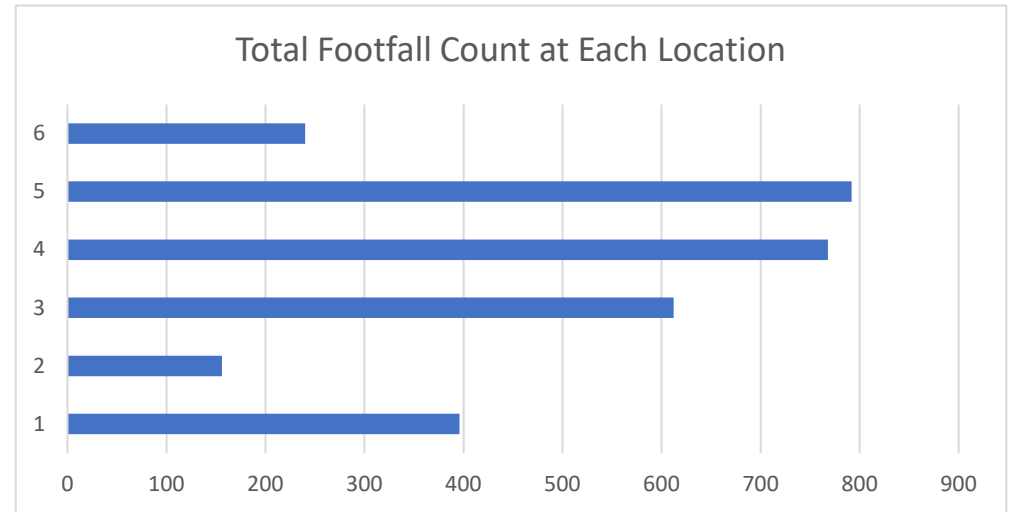


Figure 26: Portchester District Centre Total Footfall Count at Each Location

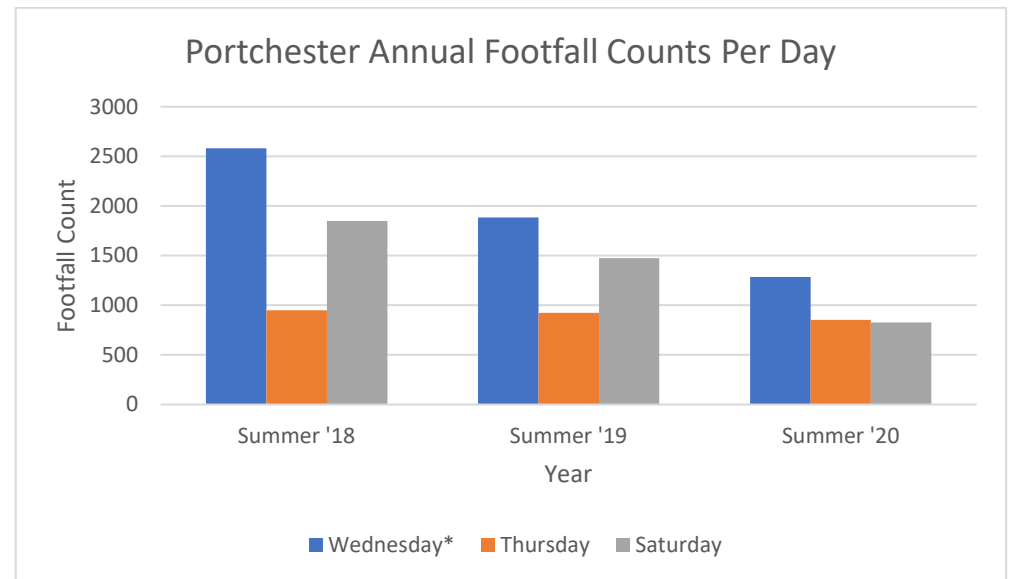


Figure 27: Portchester District Centre Total Footfall Count by Day