FAREHAM
BOROUGH COUNCIL

Fareham Borough Retail Health Check

Summary Paper 2018

Contents

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 2036. This annual update is also used to inform development management decisions on planning applications within the town, district and local centres.

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) except for Fareham Town Centre (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 Town Centre (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	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	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.	Long-term	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	Local Plan evidence studies.
Pedestrian flows	A key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets.	6-monthly for Fareham Town Centre & 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.	Long-term	Active Travel Strategy
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	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	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/LP2DSPAdopted.pdf

Fareham Local Plan 2036 (Emerging)

The Council are in the process of producing a new Local Plan. This will address the development requirements up until 2036 and is intended to replace Local Plan Part 1 (Core Strategy) and Local Plan Part 2 (Development Sites & Policies) in due course. At this stage, it is an emerging plan and as such carries limited weight. The Draft Local Plan 2036 consultation document (2017) contained the following policies that relate to retail health:

- **R1 – Hierarchy of Centres: Protecting the Vitality and Viability of Centres**
  Evidence supporting the Draft Local Plan showed that the hierarchy of centres in the Core Strategy is still relevant and appropriate, therefore Policy R1 sets out the same hierarchy as Policy CS3 with an additional Local Centre at Welborne (once complete) and with the addition of small parades of shops listed. The Small Parades play an important role in providing every-day goods within walking distance to significant numbers of residents and include Fareham (Anjou Crescent, Arundel Drive, Fairfield Avenue, Gosport Road, Greyshott Avenue, Miller Drive, Westley, Grove/Redlands), Hill Head (Crofton Lane), Portchester (White Hart Lane), Sarisbury Green (Barnes Lane, Bridge Road), Titchfield Common (Hunts Pond Road) and Warsash (Warsash Road/Dibles Road).

- **R2 – Changes of Use**
  This policy is intended to support the continued function, vitality and viability of the various centres by supporting the retention of the retail function, whilst also allowing some flexibility of town centre uses. This policy pulls together Policy DSP21, DSP22 and DSP34 as it deals with changes in the Primary and Secondary Shopping Areas as well as other centres, however, the overall policy approach remains largely unchanged.

- **R3 – Other Changes in the Centres or Small Parades**
  This policy supports regeneration and redevelopment opportunities within the defined centres, which reflects the role and relationships of the centres in the Borough's retail hierarchy. This would replace DSP34 (part) and retains the same approach to proposals that would result in an expansion to a centre or small parade.

- **R4 – Out-of-Town Shopping**
  Out-of-town shopping relates to the existing larger retail warehouse areas that are not located within the defined retail centres. Stores in these locations tend to accommodate retailers selling bulky goods and are often difficult to accommodate in the town and other centres. They provide an important contribution towards the Borough's economy and shopping offer. However, in order to ensure that the defined centres retain their vitality and viability, further out-of-town retail development is controlled through Policy R4. The policy remains largely unchanged from Policy DSP37, although the requirement for impact assessments has been expanded to include extensions that increase overall floorspace by over 500sqm.

- **R5 – Local Shops**

  Shops outside of the defined retail centres provide an important and vital service to communities and as such are covered by Policy R5. This policy seeks to ensure that these shops are retained unless alternative suitable provision remains available which meets the day-to-day needs of the local community. The policy remains largely unchanged from Policy DSP38.

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.

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

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 367 units in Fareham Town Centre, 38 (10.4%) of which are vacant. Whilst there are 3 fewer vacant units than last year, the proportion of vacant units remains fairly consistent when looking at the trendline over time. However, vacancies in the Primary Shopping Area have been increasing since 2015 which is a trend that will be monitored on an annual basis as there could be negative implications for the vitality of the town centre if this continues. The greatest loss has been seen in A2 units (financial or professional services), going from 54 units down to 49.

However, the Town Centre continues to offer a healthy range of retail groups overall. 'Services' are the most prevalent group (74 units), and there is also a large quantity of 'Eating Out' (55) and 'Wellness' (50) units. The number of 'Eating Out' units has increased from 47 in 2013 but had remained fairly consistent in the previous three years. There is a perception that charity shops are becoming more prevalent in the town centre, however, the data shows that whilst there was an increase of 1 charity shop between 2017 and 2018, overall there has been a slight decrease since 2015. There were 18 charity shops in Fareham Town Centre in 2015 and 14 in 2018 (charity shops come under mixed retail).

	No. of units	Change since 2017	% of total units	Floorspace (sqm)
Total	367	-1		89,633
Occupied	329	+2	89.6	79,325
Vacant	38	-3	10.4	10,308
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	155	+2	47.1	41,226
A2	49	-5	14.9	9,028
A3	34	-1	10.3	6,147
A4	9	0	2.7	2,988
A5	13	0	4.0	1,318
B1	12	0	3.6	2,064
B2	1	0	0.3	111
C1	2	0	0.6	767
D1	23	+2	7.0	6,962
D2	9	+1	2.7	3,697
Sui Generis	22	+3	6.7	5,016
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	6	0	1.8	1,249
Clothing	32	0	9.7	8,798
Convenience	16	-1	4.9	3,024
Eating Out	55	-1	16.7	10,398
Home & Electronics	26	+3	7.9	3,575
Mixed Retail	33	+2	10.0	19,068
Other	11	0	3.3	4,417
Recreation	26	-1	7.9	7,076
Services	74	0	22.5	15,280
Wellness	50	0	15.2	6,439

Table 3: Fareham Town Centre Ground Floor Unit Occupancy

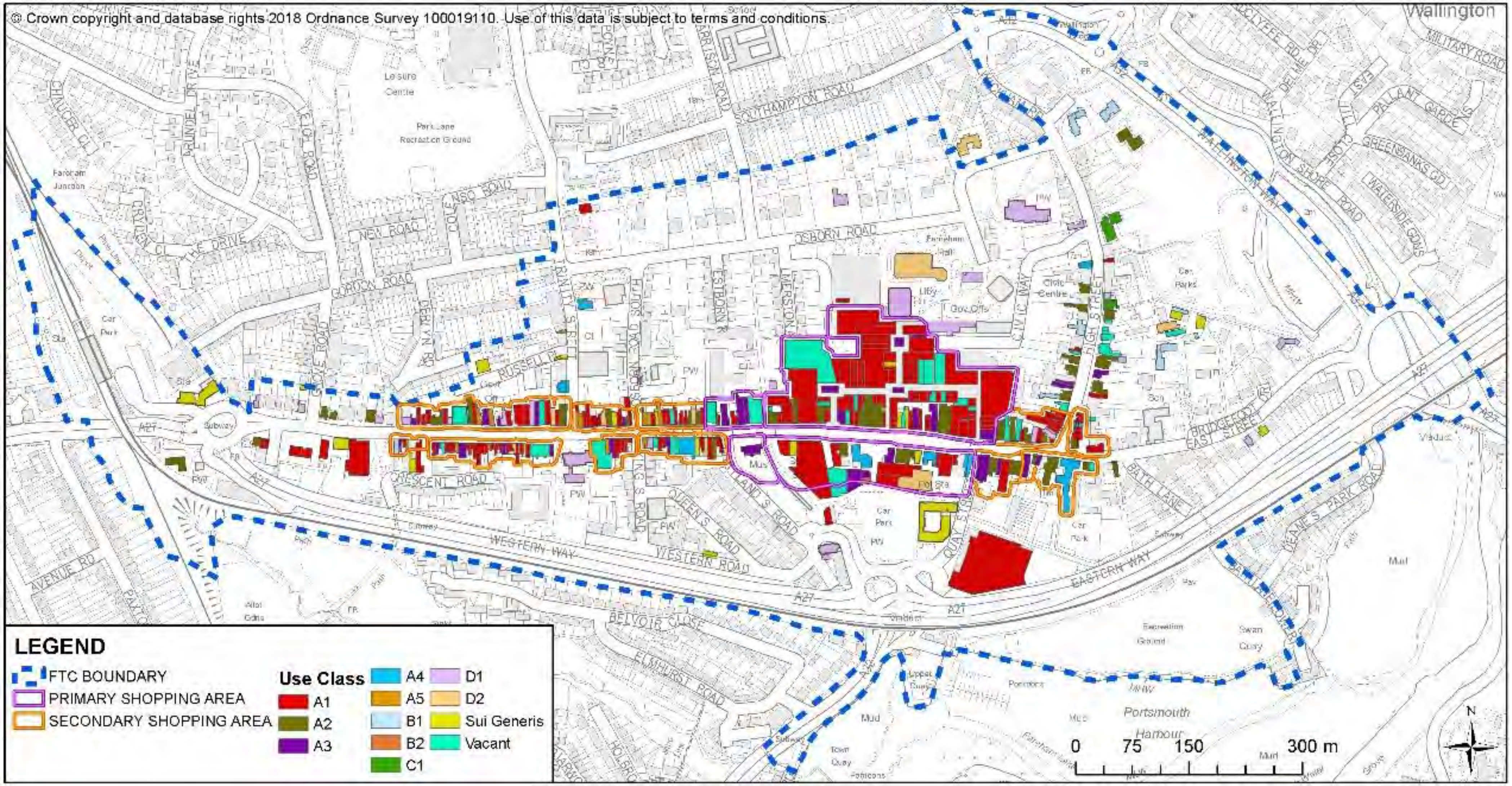

Figure 1: Fareham Town Centre Use Classes

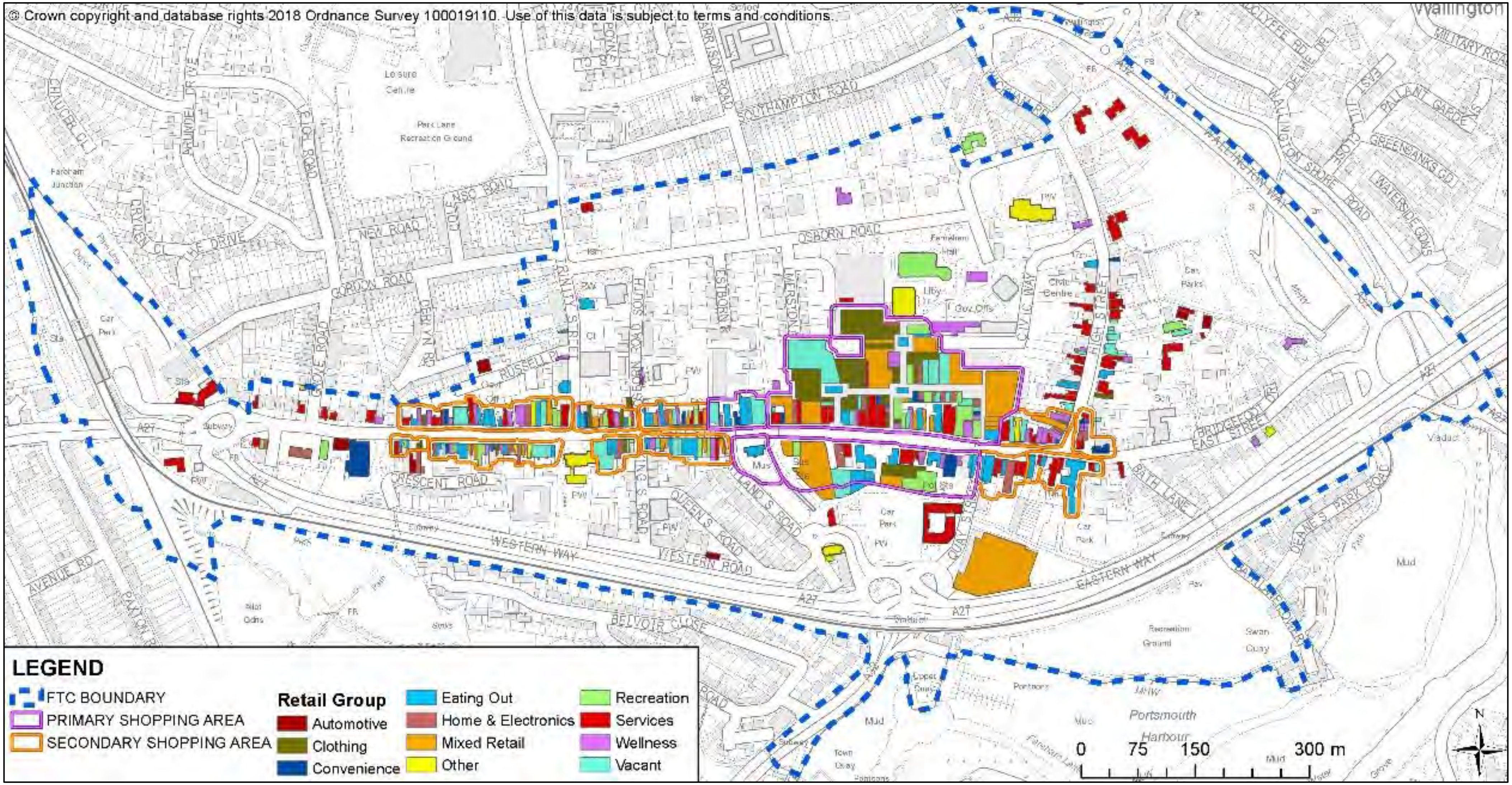

Figure 2: Fareham Town Centre Retail Groups

Primary Shopping Area

The Primary Shopping Area has a total floorspace of 40,311 sqm. It has experienced most of the vacancies in Fareham Town Centre since summer 2016. The number of vacant units has doubled from eight to sixteen representing 6,498 sqm of floorspace. Eleven of these lie in Fareham Shopping Centre shopping centre totalling 4,392 sqm of floorspace or 20.8% of the total shopping centre floorspace. Many of these are clustered in the centre's eastern wing. Significantly, Marks and Spencer closed in April 2018, however B&M has filled the large unit where BHS used to be. Fareham Shopping Centre still retains large 'high-street' chain retail outlets including Boots, New Look, Debenhams and Next.

A1 units continue to decline in the Primary Shopping Area overall with a further two units lost this year, however it is still by far the most dominant use class. Chart 1 demonstrates that the majority of the primary shopping area floorspace is in A1 use (24,794 sqm floorspace, 61.5%), however there is more vacant floorspace (6,498 sqm floorspace, 16.1%) than any other use class. With regard to retail groups, there has been very little change. There has been the loss of one 'Other' unit and one 'Services' unit and the gain of one 'Eating Out' unit. 'Mixed Retail' which had been showing a decline in recent years, remained at 18 units.

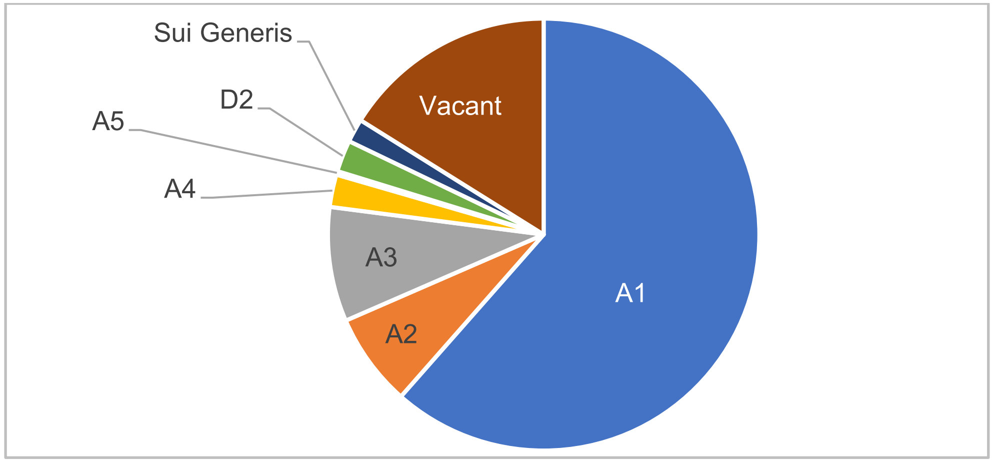

Chart 1: Fareham Town Centre Primary Shopping Area Distribution of Floorspace by Use Class

	No. of units	Change since 2017	% of total units	Floorspace (sqm)
Total	128	0		40,311
Occupied	112	-1	87.5	33,813
Vacant	16	+1	12.5	6,498
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	75	-2	67.0	24,794
A2	11	-2	9.8	2,811
A3	15	+1	13.4	3,455
A4	3	0	2.7	979
A5	1	0	0.9	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	1	0	0.9	956
Sui Generis	6	+2	5.4	711
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	0	0	0.0	0
Clothing	23	0	20.5	7,927
Convenience	6	0	5.4	948
Eating Out	19	+1	17.0	4,541
Home & Electronics	10	0	8.9	1,267
Mixed Retail	18	0	16.1	11,293
Other	0	-1	0.0	0
Recreation	10	0	8.9	3,353
Services	14	-1	12.5	3,172
Wellness	12	0	10.7	1,312

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 20,668 sqm floorspace. Therefore, in general, it is likely to experience a high turnover rate as well as temporary vacancies. However, whilst there have been a relatively high number of vacancies in the Primary Shopping Area since 2016, only minor changes have occurred in the Secondary Shopping Area. Notably there are four more A1 uses which correlates with increases in 'Home and Electronics' and 'Mixed Retail'. There have also been losses of 'Convenience', 'Eating Out' and 'Recreation' units.

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. Chart 2 shows the diverse distribution of floorspace for different use classes. There is a lower level of vacant units in the Secondary Shopping Area, with two less vacant units this year compared to last summer.

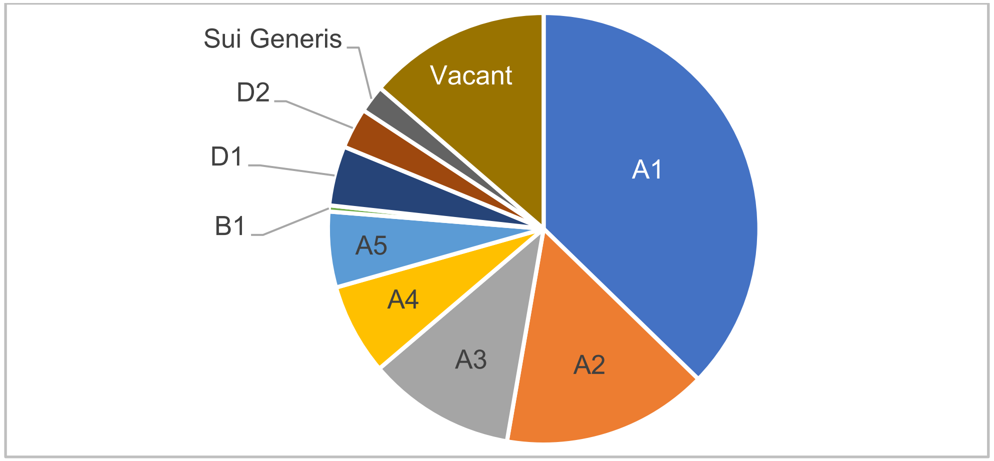

Chart 2: Fareham Town Centre Secondary Shopping Area: Distribution of Floorspace by Use Class

	No. of units	Change since 2017	% of total units	Floorspace (sqm)
Total	152	+1		20,668
Occupied	139	+3	91.4	17,840
Vacant	13	-2	8.6	2,828
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	67	+4	48.2	7,704
A2	22	-3	15.8	3,193
A3	16	-2	11.5	2,285
A4	3	0	2.2	1,412
A5	11	0	7.9	1,171
B1	1	0	0.7	95
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	8	+2	5.8	924
D2	6	+1	4.3	630
Sui Generis	5	+1	3.6	426
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	0	0	0.0	0
Clothing	8	0	5.8	743
Convenience	8	-1	5.8	743
Eating Out	29	-2	20.9	4,813
Home & Electronics	13	+3	9.4	1,879
Mixed Retail	14	+2	10.1	1,796
Other	5	+1	3.6	638
Recreation	12	-1	8.6	1,285
Services	24	0	17.3	3,331
Wellness	26	+1	18.7	2,612

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. Policy R2 in the draft Local Plan also has this requirement. Current unit occupancy complies with policy DSP34 as the majority of units are occupied by A1 retail uses which are spread throughout the 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 69 units totalling 10,238 sqm floorspace making it the second largest retail centre in the Borough.

At the time of the survey, 6 units (571 sqm floorspace) were vacant, an increase of 3 units compared to the 2017 Retail Health Check. Just over half of the occupied units in the Centre are A1 shops, although there has been a loss of one A1 unit. Most of these face onto the main shopping precinct and include high-street retailers such as the Co-op, Iceland and Superdrug.

Portchester District Centre provides a variety of retail groups, though predominantly 'Services' (23.8%) or 'Wellness' (20.6%) units. Although there are only three D1 units, they take up the second largest amount of floorspace (15.3%) after A1 uses (50.6%) because of the sizeable Portchester Health Centre and Portchester Library.

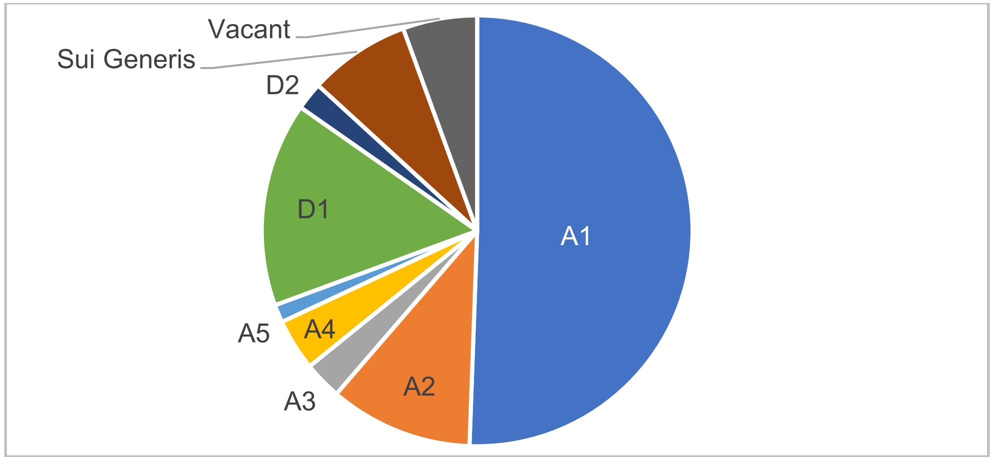

Chart 3: Portchester District Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2017	% of total units	Floorspace (sqm)
Total	69	-1		10,238
Occupied	63	-4	91.3	9667
Vacant	6	+3	8.7	571
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	32	-1	50.8	5,177
A2	10	-3	15.9	1,102
A3	4	0	6.3	292
A4	1	0	1.6	397
A5	3	0	4.8	137
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	3	-1	4.8	1,569
D2	1	0	1.6	213
Sui Generis	9	+1	14.3	781
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	1	0	1.6	100
Clothing	1	-1	1.6	76
Convenience	5	0	7.9	1,856
Eating Out	8	0	12.7	825
Home & Electronics	2	0	3.2	304
Mixed Retail	7	-1	11.1	1408
Other	4	-1	6.3	839
Recreation	7	0	11.1	632
Services	15	0	23.8	1521
Wellness	13	-1	20.6	2106

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. There is planning permission for an additional storey and three storey link between 2 West Street and 1 Castle Street and change of use from A2 use at ground floor to mixed use A1/A3 use for a coffee shop. At the time of the survey, these works were being undertaken. Future Retail Health Checks and the AMR will provide an update as and when proposals for new development in the Centre come forward.

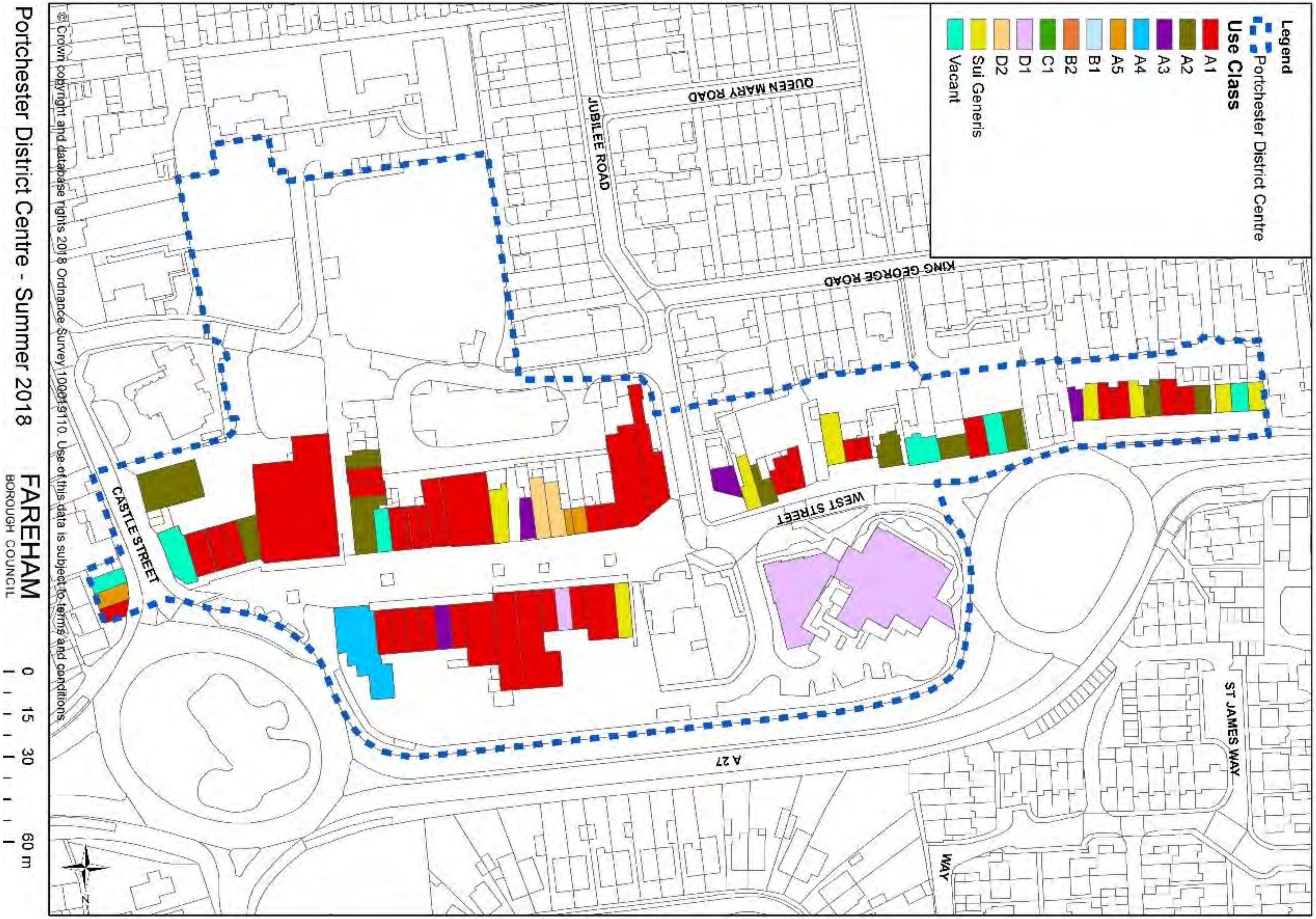

Figure 3: Portchester District Centre Use Classes

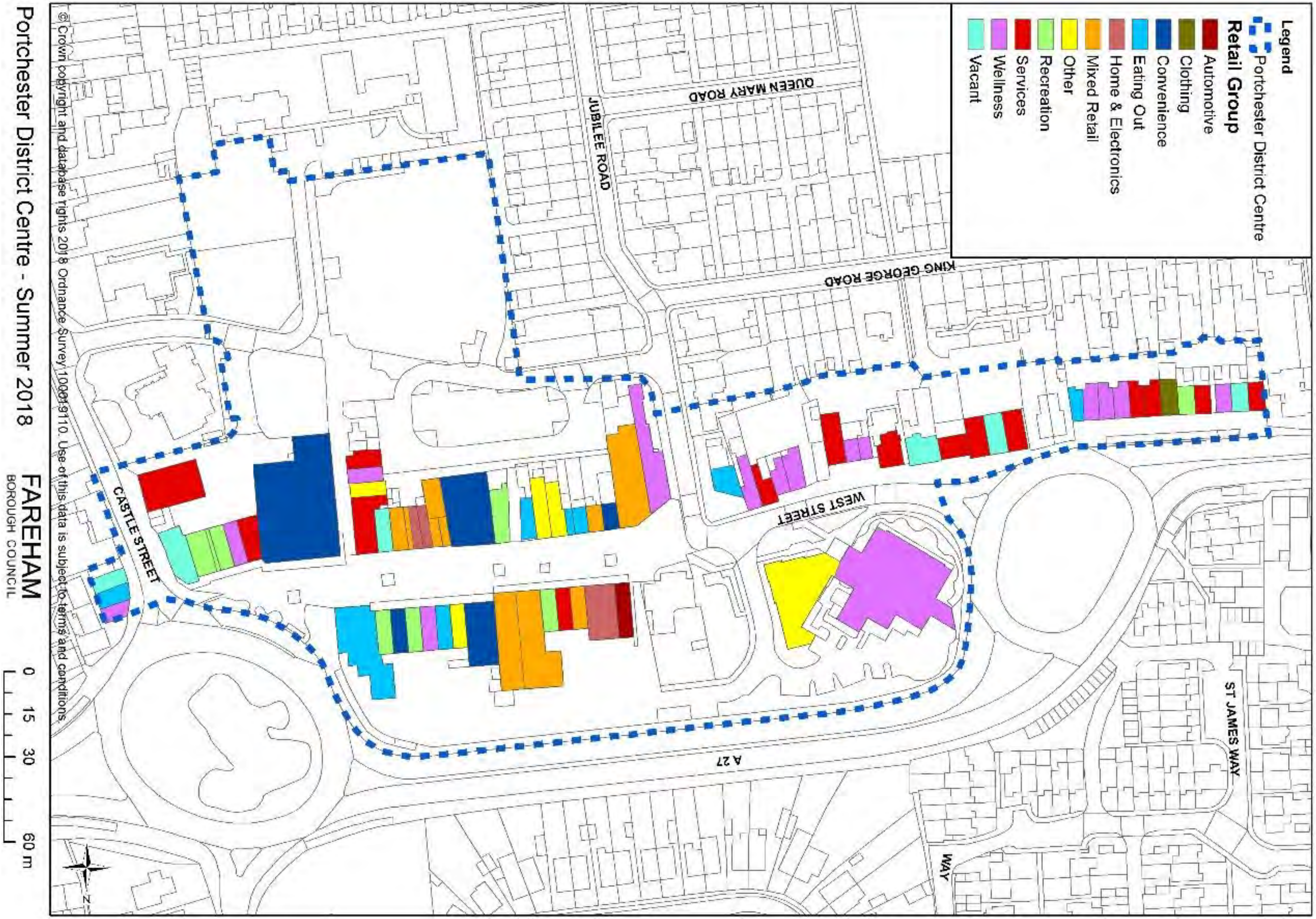

Figure 4: Portchester District Centre Retail Groups

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 28 units are occupied. A1 shops account for over 64% of the units and just over 73% of the floorspace (6,682 sqm), with nearly half the floorspace being used for 'Mixed Retail' goods. The only change since the 2017 RHC is the change of one unit from A2 to Sui Generis. This is as a result of the change of use class for betting shops, rather than a change of outlet.

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

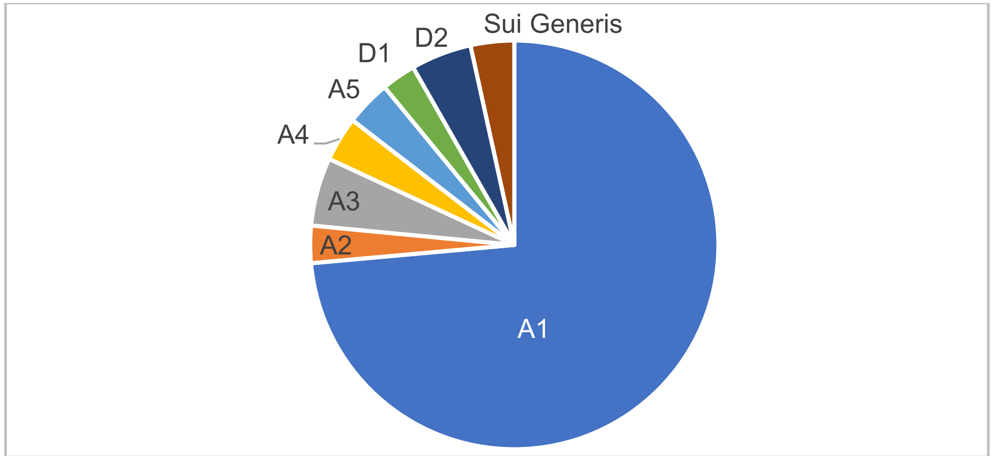

Chart 4: Locks Heath District Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2017	% of total units	Floorspace (sqm)
Total	28	0		9,063
Occupied	28	0	100%	9,063
Vacant	0	0	0%	0
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	18	0	64.3	6,682
A2	2	-1	7.1	268
A3	3	0	10.7	490
A4	1	0	3.6	300
A5	1	0	3.6	326
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	1	0	3.6	247
D2	1	0	3.6	437
Sui Generis	1	+1	3.6	313
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	0	0	0.0	0
Clothing	0	0	0.0	0
Convenience	6	0	21.4	1,154
Eating Out	6	0	21.4	1,232
Home & Electronics	0	0	0.0	0
Mixed Retail	4	0	14.3	4,234
Other	4	0	14.3	1,029
Recreation	1	0	3.6	313
Services	4	0	14.3	481
Wellness	3	0	10.7	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 2000sqm of additional convenience floorspace and additional cafes, restaurants and comparison retail units of a scale appropriate to the District Centre. Since the summer 2017 survey there has been no additional floorspace 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. In recent years, the Centre has seen the departure of Budgens, which was subsequently split into two units, which are now occupied by the Co-op and Costa.

There are 44 units and 5,578 sqm floorspace in Stubbington Local Centre, only one of which is vacant. The Centre predominantly consists of A1 uses; 65.1% of occupied units and 66.7% of floorspace. Since the 2017 Retail Health Check there have only been minor changes. There are two additional A1 units and the vacant unit in Stubbington Shopping Mall has been filled by Dolphin Embroidery.

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. The evidence demonstrates that the Centre continues to be stable and relatively successful.

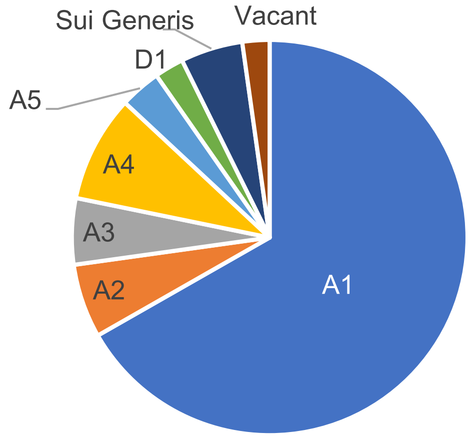

Chart 5: Stubbington Local Centre Distribution of Floorspace by Use Class

Policy Monitoring

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

	No. of units	Change since 2017	% of total units	Floorspace (sqm)
Total	44	+2		5,578
Occupied	43	+3	97.7	5,454
Vacant	1	-1	2.3	124
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	28	+2	65.1	3,723
A2	4	0	9.3	337
A3	3	0	7.0	303
A4	1	0	2.3	487
A5	3	0	7.0	187
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	1	0	2.3	134
D2	0	0	0.0	0
Sui Generis	3	+1	7.0	283
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	0	0	0.0	0
Clothing	2	0	4.7	126
Convenience	7	0	16.3	1,665
Eating Out	7	0	16.3	977
Home & Electronics	1	+1	2.3	99
Mixed Retail	6	0	14.0	879
Other	3	0	7.0	354
Recreation	1	0	2.3	104
Services	8	+1	18.6	536
Wellness	8	+1	18.6	714

Table 8: Stubbington Local Centre Ground Floor Unit Occupancy

Figure 7: Stubbington Local Centre Use Classes

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 6,947 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 2,371 sqm floorspace. A high proportion of the units are for A1 (38.5%) and A2 (44.2%) and these also make up the majority of the floorspace at 36.1% and 29.5% respectively. Since the 2017 Retail Health Check there has been a loss of two A2 units and one A3 unit as well as one additional Sui Generis use.

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

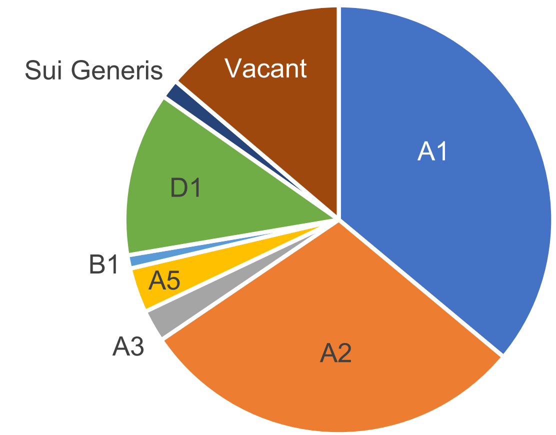

Chart 6: Park Gate Local Centre Distribution of Floorspace by Use Class

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 floorspace for A2 uses. Despite the A2 uses, the Centre remains compliant with criterion ii of Policy DSP34 as the uses still maintain active shop window displays.

	Number of units	Change since 2017	% of total units	Floorspace (sqm)
Total	57	0		6,947
Occupied	52	-2	91.2	5,989
Vacant	5	+2	8.8	959
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	20	0	38.5	2,505
A2	23	-2	44.2	2,047
A3	2	-1	3.8	168
A4	0	0	0.0	0
A5	2	0	3.8	236
B1	1	0	1.9	70
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	3	0	5.8	861
D2	0	0	0.0	0
Sui Generis	1	+1	1.9	101
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	0	0	0.0	0
Clothing	1	0	1.9	27
Convenience	2	0	3.8	954
Eating Out	4	-1	7.7	404
Home & Electronics	4	0	7.7	391
Mixed Retail	0	0	0.0	0
Other	4	0	7.7	1,015
Recreation	3	0	5.8	169
Services	28	-1	53.8	2,371
Wellness	6	0	11.5	657

Table 9: Park Gate Local Centre Ground Floor Unit Occupancy

Figure 9: Park Gate Local Centre Use Classes

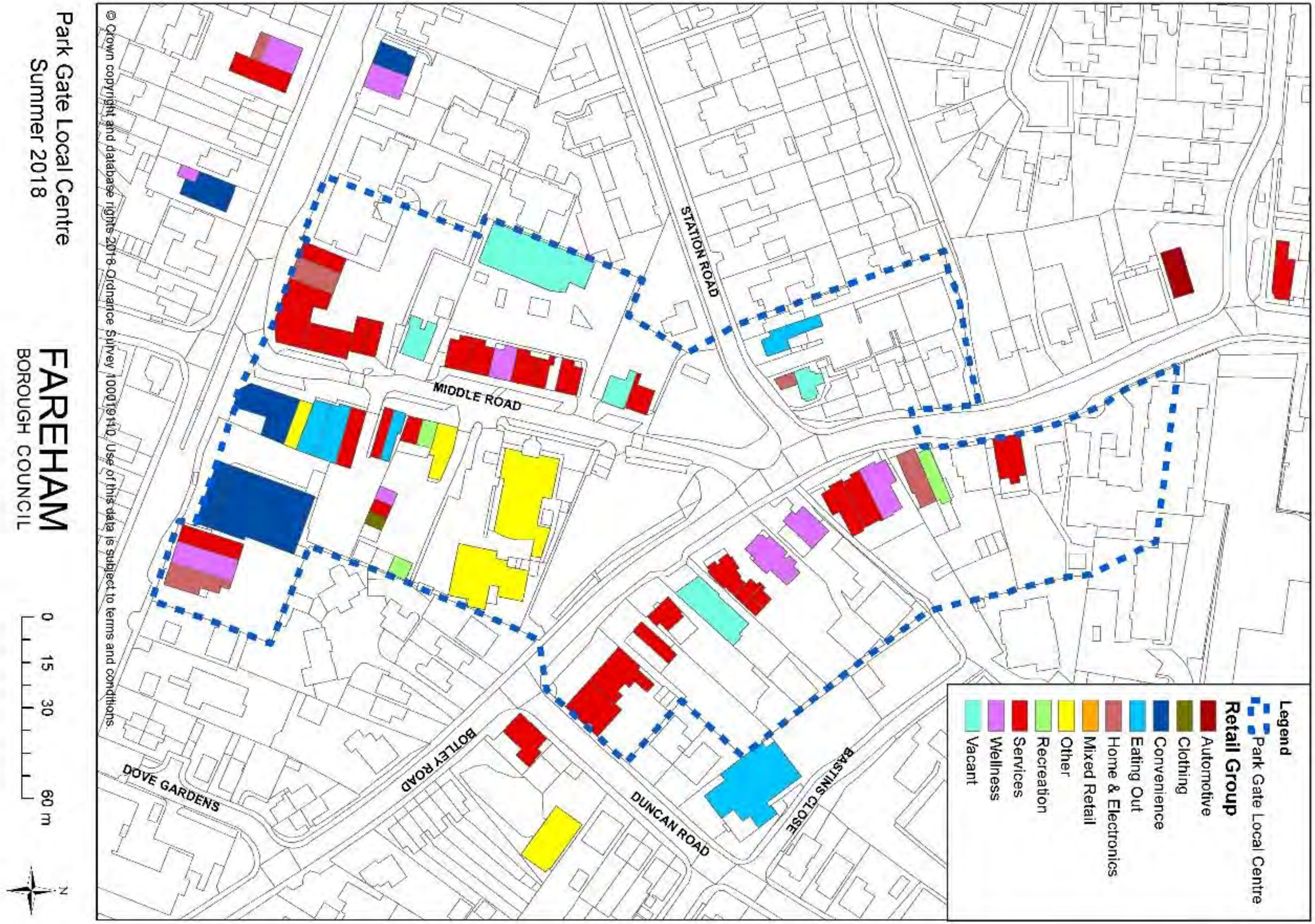

Figure 10: Park Gate Local Centre Retail Groups

Broadlaw Walk Local Centre

Broadlaw Walk is a Local Centre situated in the south-west of Fareham town, it serves local people from the surrounding residential areas. It is a small centre with just six units. At the time of the 2018 Retail Health Check there were no vacancies. A1 is the dominant use class in terms of both numbers of units and total floorspace at 3 units and 925 sqm floorspace. There have been no changes in any of the units since the 2017 Retail Health Check indicating that the centre is relatively stable and successful.

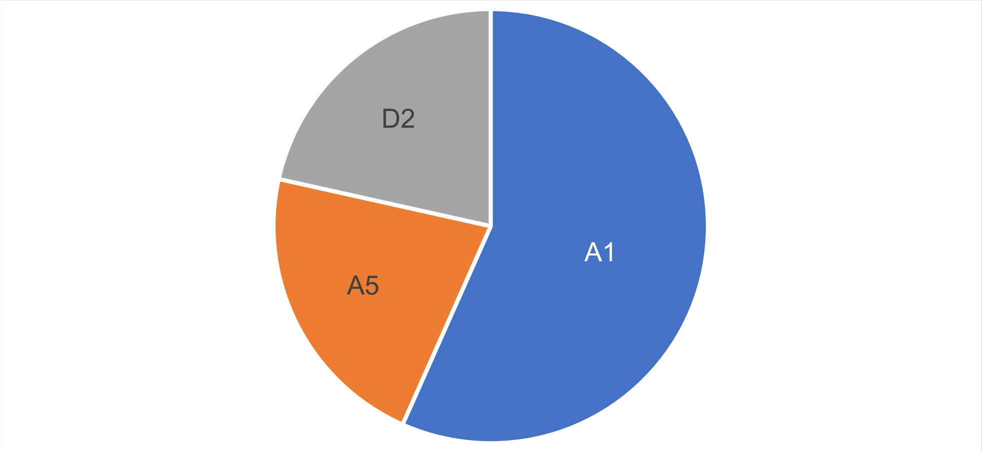

Chart 7: Broadlaw Walk Local Centre Distribution of Floorspace by Use Class

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.

	No. of units	Change since 2017	% of total units	Floorspace (sqm)
Total	6	**-**		1,633
Occupied	6	-	100.0	1,633
Vacant	0	-	0.0	0
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	3	-	50.0	925
A2	0	-	0.0	0
A3	0	-	0.0	0
A4	0	-	0.0	0
A5	2	-	33.3	357
B1	0	-	0.0	0
B2	0	-	0.0	0
C1	0	-	0.0	0
D1	0	-	0.0	0
D2	1	-	16.7	351
Sui Generis	0	-	0.0	0
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	0	-	0.0	0
Clothing	0	-	0.0	0
Convenience	1	-	16.7	462
Eating Out	2	-	33.3	357
Home & Electronics	0	-	0.0	0
Mixed Retail	0	-	0.0	0
Other	1	-	16.7	351
Recreation	0	-	0.0	0
Services	0	-	0.0	0
Wellness	2	-	33.3	464

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 2018 Retail Health Check. A1 and A5 are the dominant use classes in the Centre making up over 50% (1,773 sqm floorspace) and 26% (369 sqm floorspace) respectively, of all units and 84.2% of total floorspace (2,142 sqm). In terms of the retail groups, 'Eating Out' accounts for over a third of all units at 36.8%.

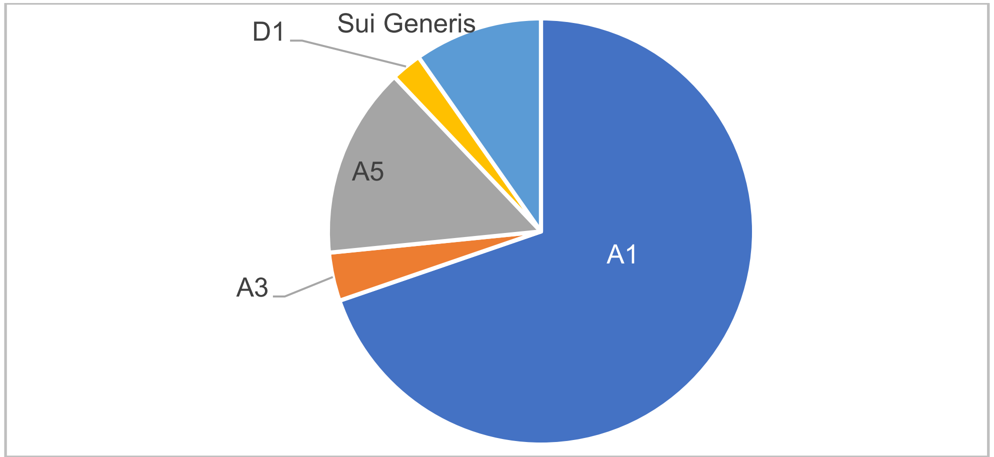

Chart 8: Highlands Road Local Centre Distribution of Floorspace by Use Class

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 2017	% of total units	Floorspace (sqm)
Total	19	-		2,543
Occupied	19	-	100.0	2,543
Vacant	0	-	0.0	0
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	10	-	52.6	1,773
A2	0	-	0.0	0
A3	1	-	5.3	93
A4	0	-	0.0	0
A5	5	-	26.3	369
B1	0	-	0.0	0
B2	0	-	0.0	0
C1	0	-	0.0	0
D1	1	-	5.3	60
D2	0	-	0.0	0
Sui Generis	2	-	10.5	248
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	0	-	0.0	0
Clothing	0	-	0.0	0
Convenience	3	-	15.8	965
Eating Out	7	-	36.8	529
Home & Electronics	0	-	0.0	0
Mixed Retail	1	-	5.3	172
Other	1	-	5.3	60
Recreation	2	-	10.5	206
Services	1	-	5.3	88
Wellness	4	-	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 2018 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.

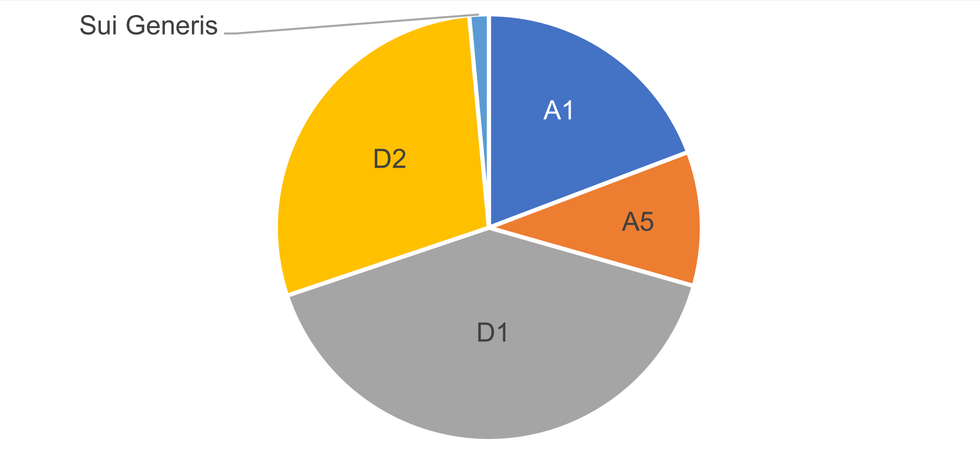

Chart 9: Gull Coppice Local Centre Distribution of Floorspace by Use Class

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 2017	% of total units	Floorspace (sqm)
Total	9	**-**		1,955
Occupied	9	-	100.0	1,955
Vacant	0	-	0.0	0
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	3	-	33.3	376
A2	0	-	0.0	0
A3	0	-	0.0	0
A4	0	-	0.0	0
A5	2	-	22.2	199
B1	0	-	0.0	0
B2	0	-	0.0	0
C1	0	-	0.0	0
D1	2	-	22.2	790
D2	1	-	11.1	561
Sui Generis	1	-	11.1	29
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	0	-	0.0	0
Clothing	0	-	0.0	0
Convenience	1	-	11.1	269
Eating Out	2	-	22.2	199
Home & Electronics	0	-	0.0	0
Mixed Retail	0	-	0.0	0
Other	2	-	22.2	589
Recreation	0	-	0.0	0
Services	1	-	11.1	428
Wellness	3	-	33.3	469

Table 12: Gull Coppice Local Centre Ground Floor Unit Occupancy

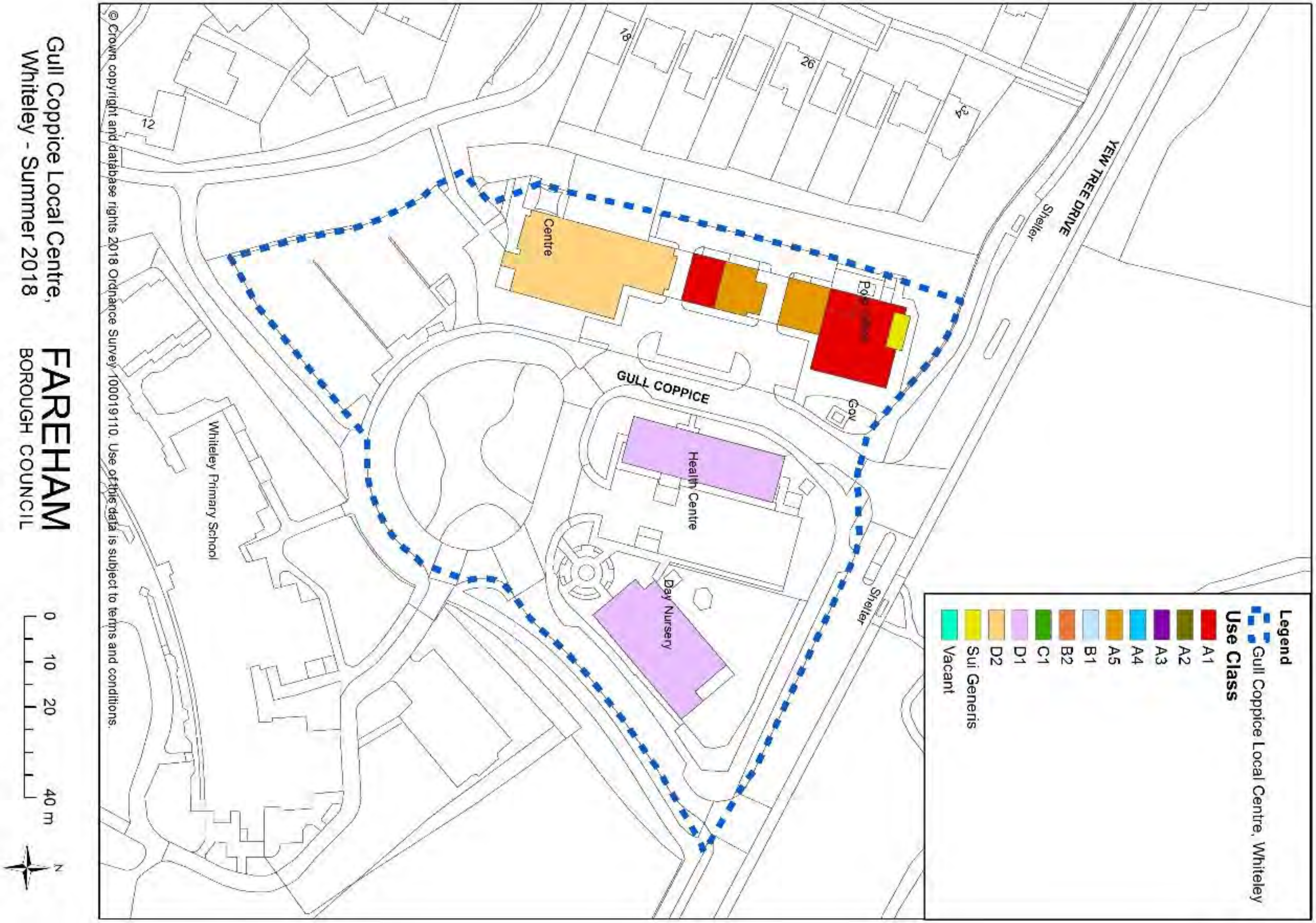

Figure 15: Gull Coppice Local Centre Use Classes

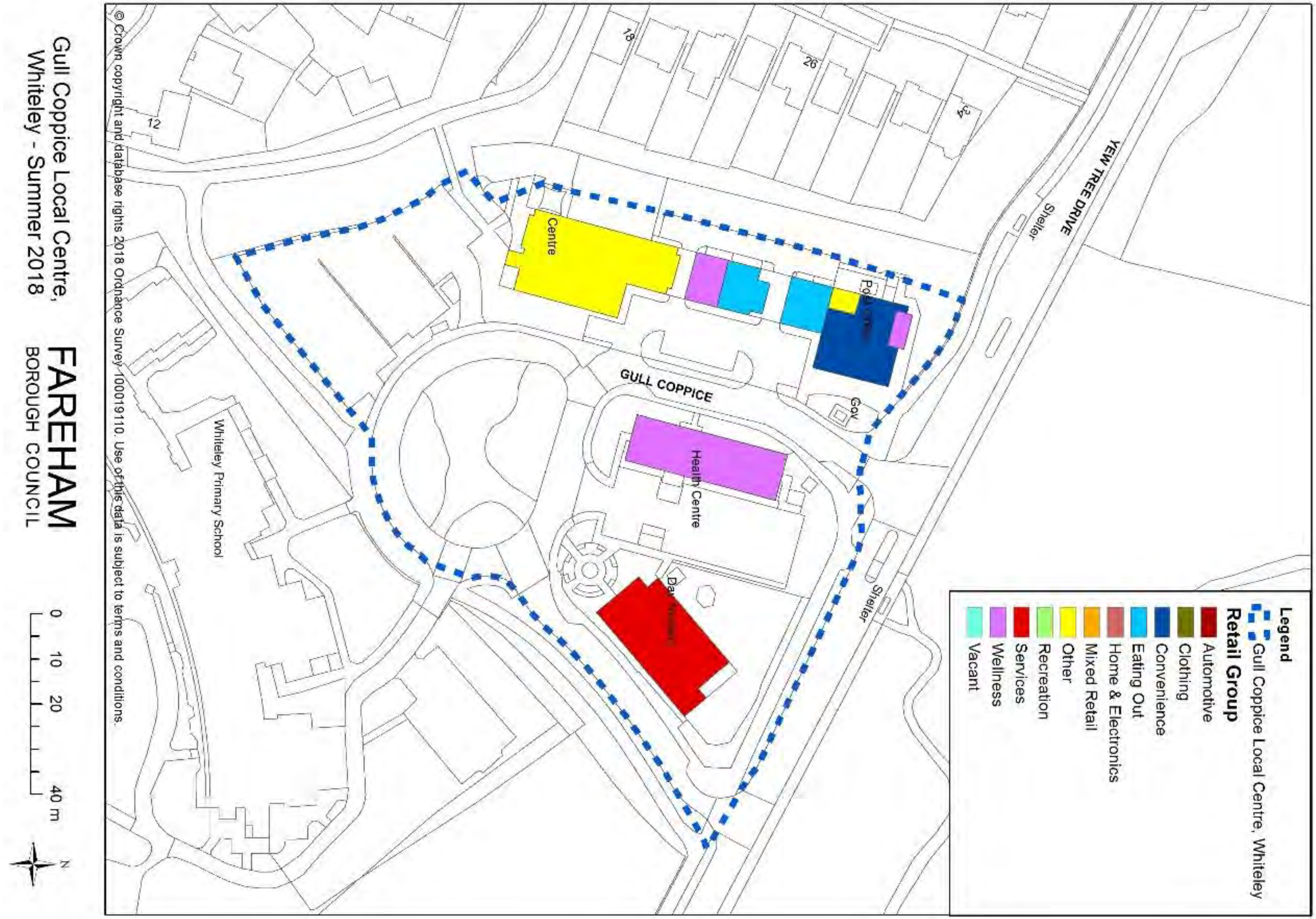

Figure 16: Gull Coppice Local Centre Retail Groups

Titchfield Local Centre

Titchfield Local Centre is located in the centre of the borough. There were no vacant units at the time of the summer 2018 Retail Health Check. A1 is the dominant use class with 54.2% of units. In terms of the retail groups there is a good variety, 'Eating Out' and 'Wellness' account for 25% of the units each with 'Convenience' and 'Services' at 16.7% each. In terms of floorspace, A1 is still the most dominant use class at 1,242 sqm floorspace representing 50.1% of total floorspace. However, despite only making up 12.5% of the total units, the second highest proportion of floorspace is A4 (738 sqm) due to the two largest units, the Bugle Hotel and the Queens Head Pub both being use class A4.

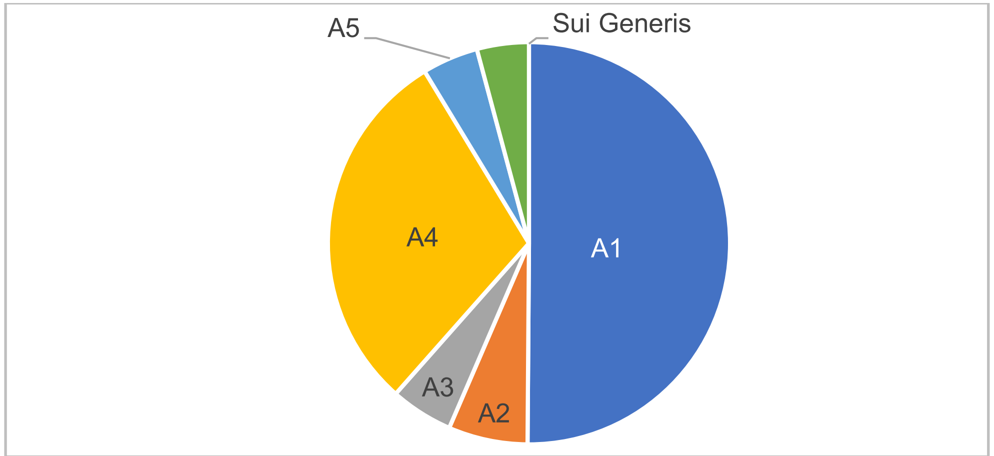

Chart 10: Titchfield Local Centre Distribution of Floorspace by Use Class

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 2017	% of total units	Floorspace (sqm)
Total	24	-		2,479
Occupied	24	-	100.0	2,479
Vacant	0	-	0.0	0
Use Class	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
A1	13	-	54.2	1,242
A2	3	-	12.5	158
A3	2	-	8.3	125
A4	3	-	12.5	738
A5	1	-	4.2	112
B1	0	-	0.0	0
B2	0	-	0.0	0
C1	0	-	0.0	0
D1	0	-	0.0	0
D2	0	-	0.0	0
Sui Generis	2	-	8.3	104
Retail Group	**No. of units**	**Change since 2017**	**% occupied units**	**Floorspace (sqm)**
Automotive	0	-	0.0	0
Clothing	1	-	4.2	63
Convenience	4	-	16.7	509
Eating Out	6	-	25.0	975
Home & Electronics	0	-	0.0	0
Mixed Retail	2	-	8.3	189
Other	1	-	4.2	100
Recreation	0	-	0.0	0
Services	4	-	16.7	242
Wellness	6	-	25.0	401

Table 13: Titchfield Local Centre Ground Floor Unit Occupancy

Figure 17: Titchfield Local Centre Use Classes

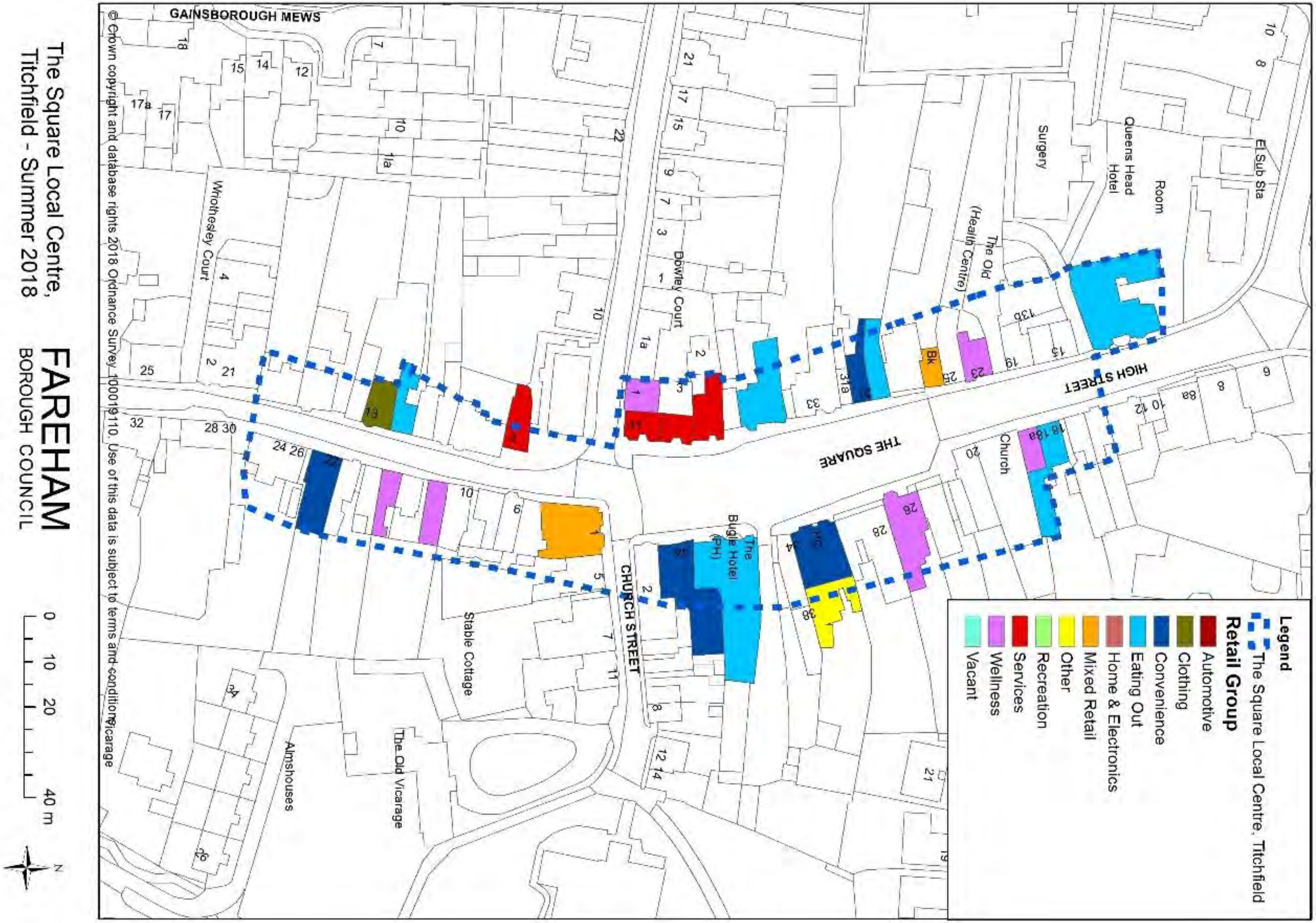

Figure 18: Titchfield Local Centre Retail Groups

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 2018 Retail Health Check there were no vacant units in the Centre. A1 is the dominant use class both in terms of the number of units (50.0%) and total floorspace (1,219 sqm or 40.4%). In terms of the retail groups most of the units are 'Wellness' (27.3%), 'Services' (22.7%) or 'Eating Out' (18.2%).

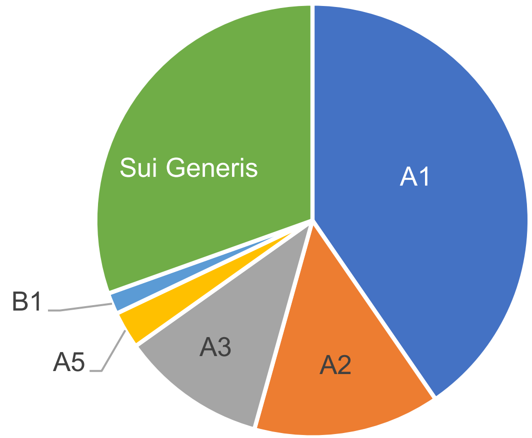

Chart 11: Warsash Local Centre Distribution of Floorspace by Use Class

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 2017	% of total units	Floorspace (sqm)
Total	22	-		3,017
Occupied	22	-	100.0	3,017
Vacant	0	-	0.0	0
Use Class	**No. of units**	**Change since 2017**	**% of occupied units**	**Floorspace (sqm)**
A1	11	-	50.0	1,219
A2	2	-	9.1	420
A3	3	-	13.6	327
A4	0	-	0.0	0
A5	1	-	4.5	84
B1	1	-	4.5	48
B2	0	-	0.0	0
C1	0	-	0.0	0
D1	0	-	0.0	0
D2	0	-	0.0	0
Sui Generis	4	-	18.2	919
Retail Group	**No. of units**	**Change since 2017**	**% of occupied units**	**Floorspace (sqm)**
Automotive	2	-	9.1	828
Clothing	2	-	9.1	146
Convenience	1	-	4.5	394
Eating Out	4	-	18.2	411
Home & Electronics	1	-	4.5	103
Mixed Retail	0	-	0.0	0
Other	0	-	0.0	0
Recreation	1	-	4.5	83
Services	5	-	22.7	590
Wellness	6	-	27.3	461

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 Thursday 7th, Saturday 9th and Monday 11th June 2018; illustrating the level of pedestrian flow on a regular weekday, the weekend and on Fareham's weekly market day. This enables analysis of these factors on footfall counts over the years. All counts were undertaken between 10am and 12 noon.

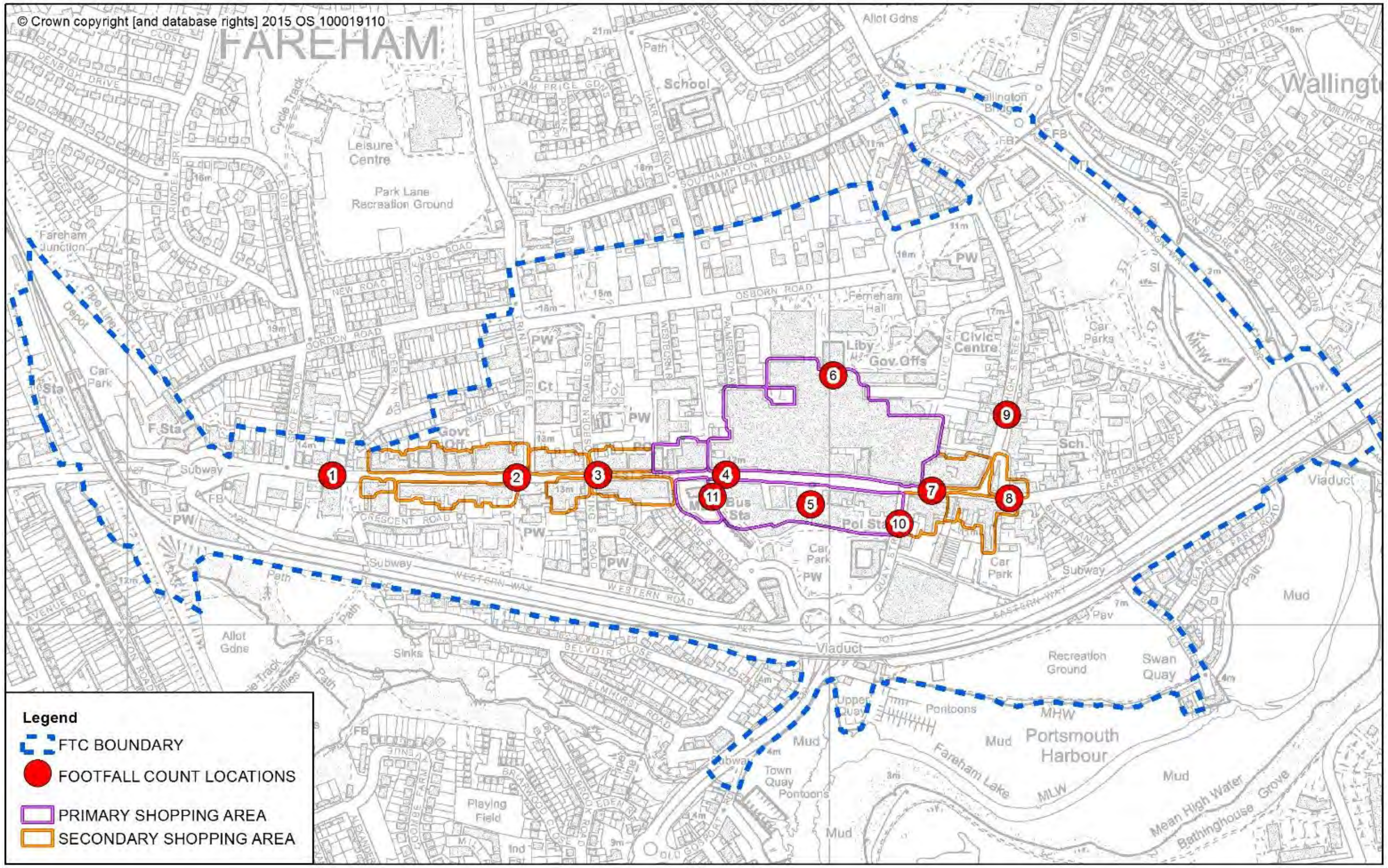

Figure 21: Footfall Count Locations - Fareham Town Centre

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 but this has decreased to 21,456 in 2018, a drop of 32.6%. Footfall in summer 2016 peaked in comparison to the trend from 2013 to 2015, whereas counts in 2017 and 2018 correspond with the more general downwards trend indicated by the years leading up to 2016.

In terms of analysing daily footfall figures, the Saturday count has shown a downward trend since 2013. This trend was even more pronounced between summer 2017 and summer 2018 going from 10,200 to 6,756, a decrease of 33.8%. If this continues it could cause significant impact to the retail trade; especially considering businesses traditionally benefit most from trade on Saturdays. Furthermore, as Figure 23 displays, the gap between the highest and lowest counts is closer this year than in any preceding year. In 2013 the Saturday count was significantly higher than the counts for a regular weekday and market day with a count of 12,396 on the Saturday compared to 9,358 on the Friday, a difference of 32.5%. However, in 2018 the day with the highest count (Monday) is only 18% higher than the day with the lowest count (Friday). Positively, the Monday count continues to remain higher than the Friday count, illustrating the positive impact of the market on town centre activity.

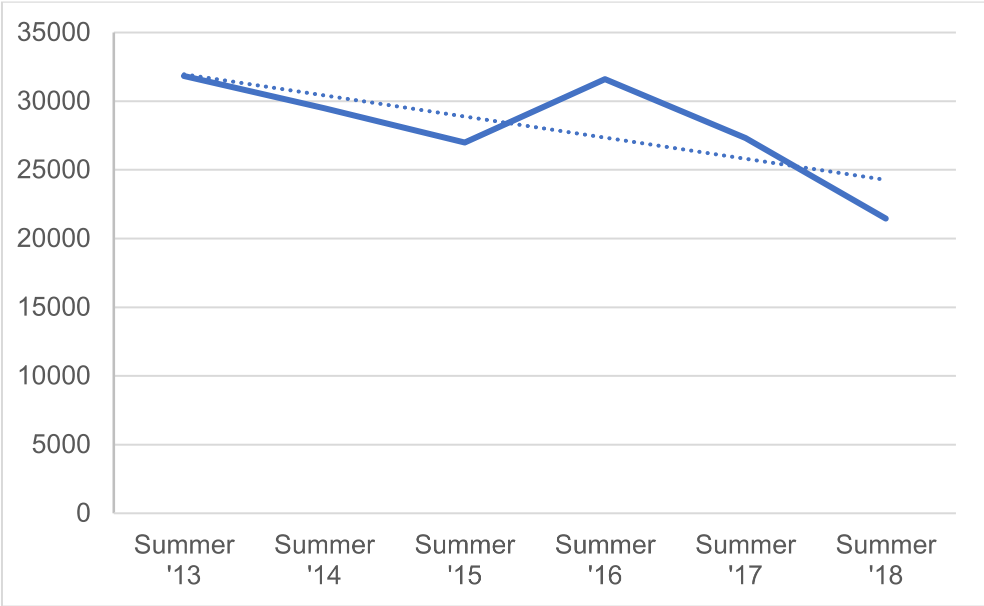

Figure 22: Fareham Town Centre Total Annual Footfall

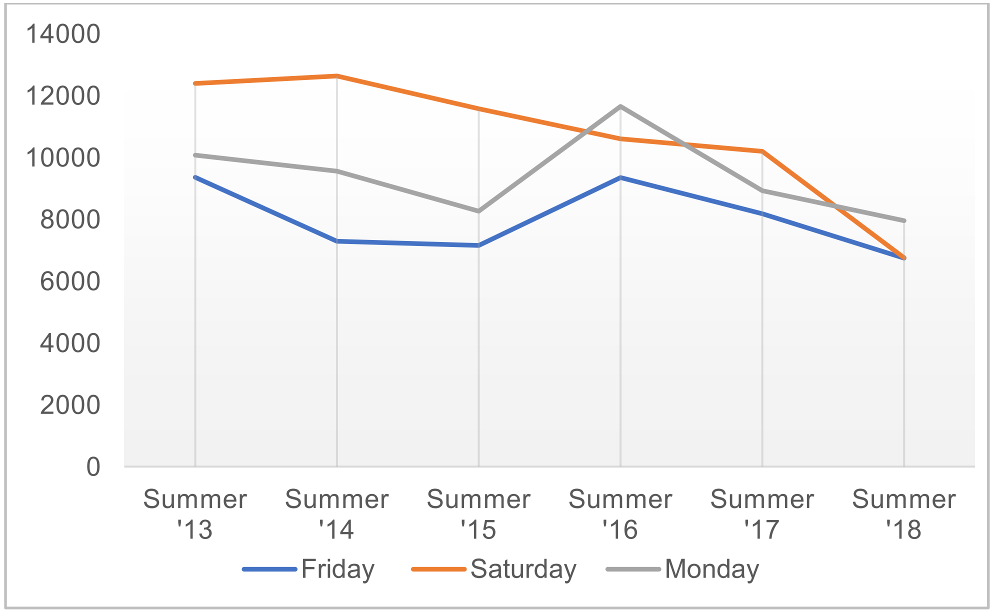

Figure 23: Fareham Town Centre Total Annual Footfall by Day

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 72	W: 96	168
2	E: 228	W: 84	312
3	E: 324	W: 204	528
4	E: 900	W: 684	1584
5	N: 504	S: 492	996
6	N: 324	S: 840	1164
7	E: 228	W: 240	468
8	E: 120	W: 120	240
9	N: 144	S: 192	336
10	N: 144	S: 216	360
11	N: 408	S: 180	588

Table 15: Fareham Town Centre Footfall count per hour: Thursday 7th June 2018

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 84	W: 72	156
2	E: 180	W: 204	384
3	E: 432	W: 324	756
4	E: 840	W: 804	1644
5	N: 540	S: 564	1104
6	N: 456	S: 648	1104
7	E: 312	W: 648	960
8	E: 156	W: 180	336
9	N: 144	S: 0	144
10	N: 420	S: 312	732
11	N: 348	S: 228	576

Table 17: Fareham Town Centre Footfall count per hour: Monday 11th June 2018

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 204	W: 72	276
2	E: 240	W: 300	540
3	E: 492	W: 240	732
4	E: 804	W: 444	1248
5	N: 516	S: 372	888
6	N: 240	S: 396	636
7	E: 252	W: 444	696
8	E: 192	W: 84	276
9	N: 108	S: 168	276
10	N: 360	S:336	696
11	N: 288	S: 204	492

Table 16: Fareham Town Centre Footfall count per hour: Saturday 9th June 2018

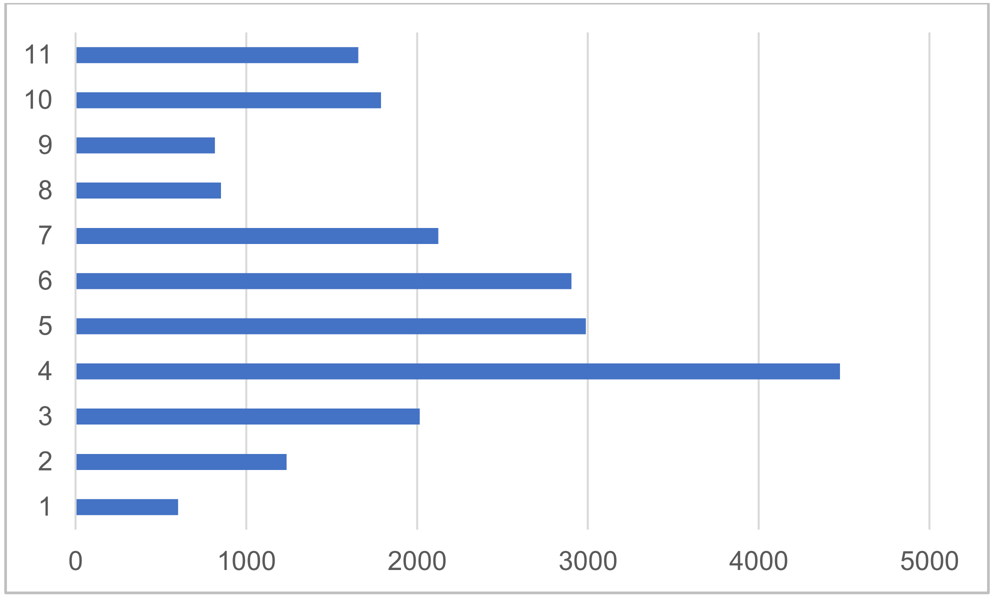

Figure 24: Fareham Town Centre Total Footfall Count at Each Location

Portchester District Centre: Footfall Count

Method

This is the first 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 new Lidl on Southampton Road.

The footfall surveys were conducted on Wednesday 6th June, Thursday 7th June and Saturday 9th June 2018 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.

In terms of footfall analysis, Wednesday had significantly higher footfall than both Thursday and Saturday, illustrating the positive impact of the market on activity. Although there is no historic data to compare footfall counts to previous years, this data provides a starting point to build a clearer picture or retail health in Portchester District Centre moving forwards.

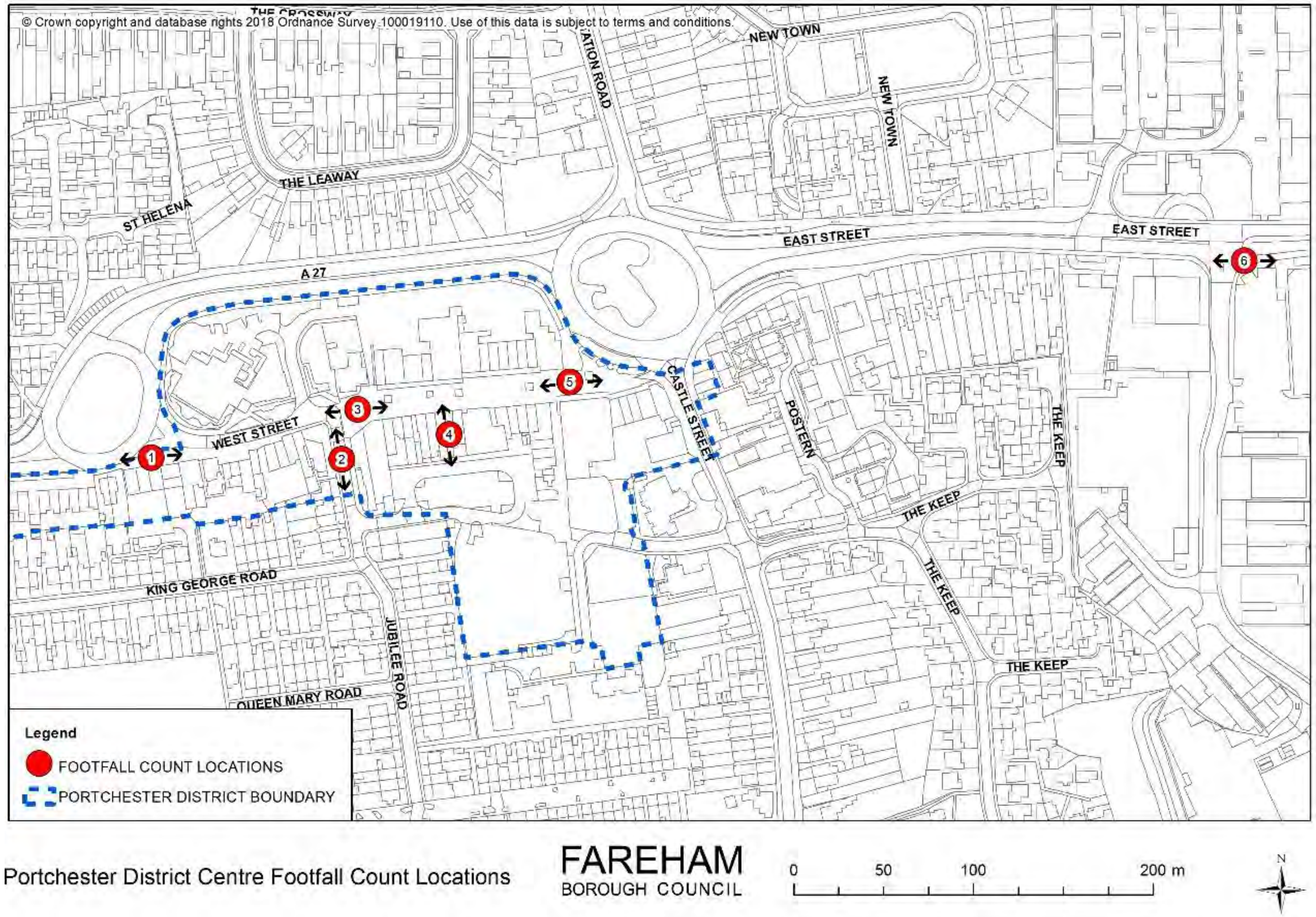

Figure 25: Footfall Count Locations: Portchester District Centre

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 60	W: 72	132
2	N: 204	S: 300	504
3	E: 288	W: 432	720
4	N: 240	S: 204	444
5	E: 312	W: 444	756
6	E: 0	W: 24	24

Table 18: Portchester District Centre Footfall count per hour: Wednesday 6th June 2018

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 12	W: 36	48
2	N: 84	S: 48	132
3	E: 180	W: 180	360
4	N: 108	S: 84	192
5	E: 72	W: 96	168
6	E: 48	W: 0	48

Table 19: Portchester District Centre Footfall count per hour: Thursday 7th June 2018

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 120	W: 84	204
2	N: 120	S: 48	168
3	E: 192	W: 228	420
4	N: 96	S: 204	300
5	E: 372	W: 276	648
6	E: 72	W: 36	108

Table 20: Portchester District Centre Footfall count per hour: Saturday 9th June 2018

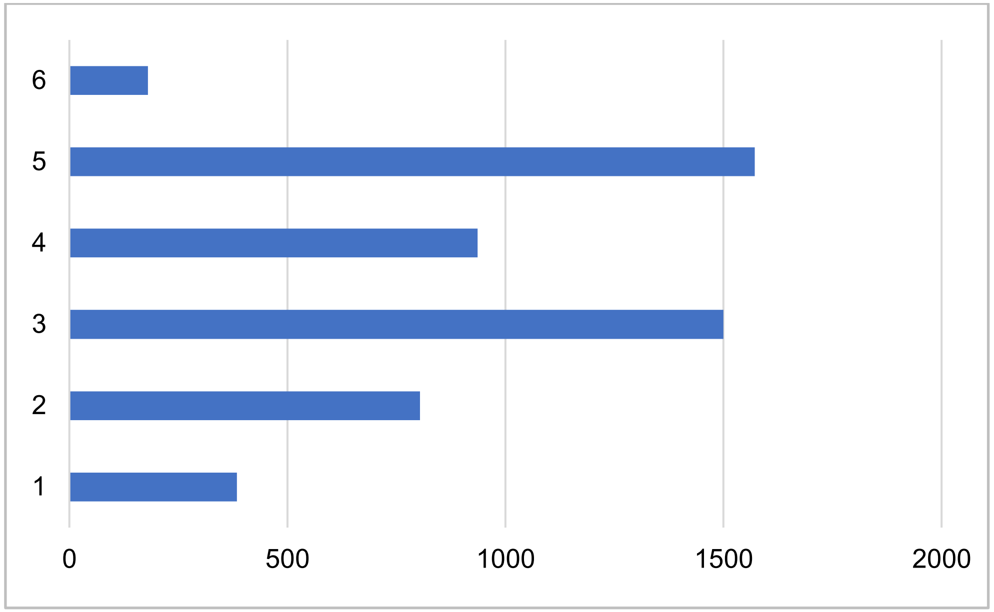

Figure 26: Portchester District Centre Total Footfall Count at Each Location

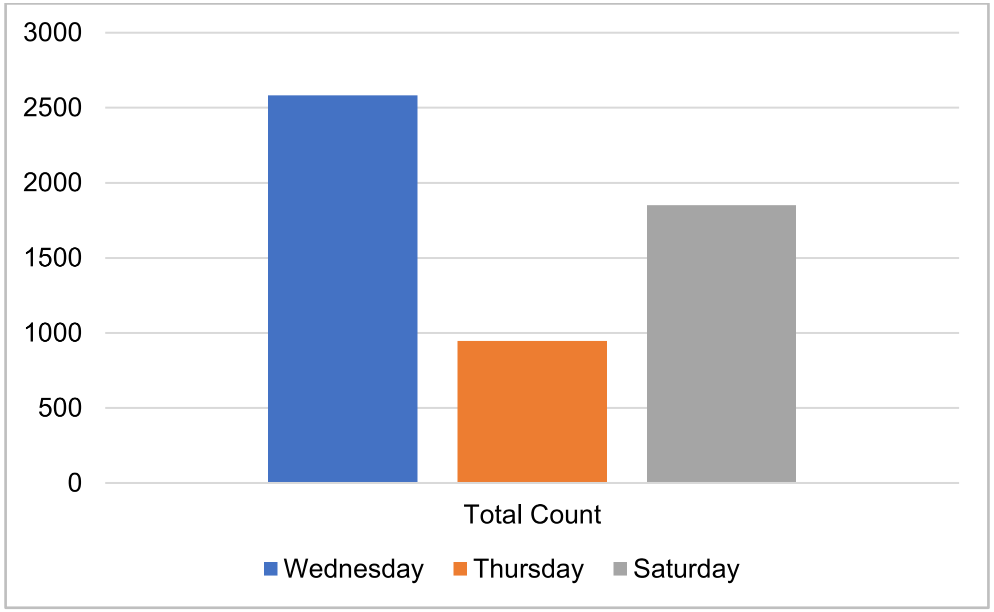

Figure 27: Portchester District Centre Total Footfall Count by Day