

Fareham Borough Retail Health Check

Summary Paper 2019

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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 2036. 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 2019.

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	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.	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/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.

In light of the changes to the National Planning Policy Framework (NPPF) introduced in 2018, the Draft Local Plan 2036 (which was subject to consultation in 2017) is being reviewed and therefore the draft policies may be subject to change. Details of the timeframe for the local plan review can be found in the Local Development Scheme¹ and progress of the draft local plan is available on the Council's website.

¹ http://www.fareham.gov.uk/PDF/planning/local_plan/LDS_March2019.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.

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 370 units in Fareham Town Centre, 37 (10%) of which are vacant. Although a small reduction in the vacancy rate is evident this year, vacancies in Fareham Shopping Centre 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 in the Town Centre has been seen in A2 units (financial or professional services), going from 49 units down to 46.

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' (56) units. The largest increase in use class this year is in Sui Generis, which has increased to 27 units. Sui Generis class includes some 'Wellness', such as beauty salons and nail bars.

	No. of units	Change since 2018	% of total units	Floorspace (sqm)
Total	370	+3		89,751
Occupied	333	+4	90	79,725
Vacant	37	-1	10	10,026
Use Class	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
A1	157	+2	47.2	41,773
A2	46	-3	13.8	8,545
A3	36	+2	10.8	5,882
A4	8	-1	2.4	2,925
A5	12	-1	3.6	1,148
B1	10	-2	3.0	1,676
B2	2	+1	0.6	182
C1	2	0	0.6	767
D1	24	+1	7.2	7,145
D2	9	0	2.7	4,048
Sui Generis	27	+5	8.1	5,634
Retail Group	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
Automotive	6	0	1.8	1,386
Clothing	29	-3	8.7	8,326
Convenience	16	0	4.8	1,840
Eating Out	56	+1	16.8	9,955
Home & Electronics	28	+2	8.4	3,750
Mixed Retail	35	+2	10.5	21,073
Other	11	0	3.3	4,739
Recreation	25	-1	7.5	7,048
Services	74	0	22.3	14,934
Wellness	53	+3	15.9	6,674

Table 3: Fareham Town Centre Ground Floor Unit Occupancy

Figure 1: Fareham Town Centre Use Classes

Fareham Town Centre - Summer 2019

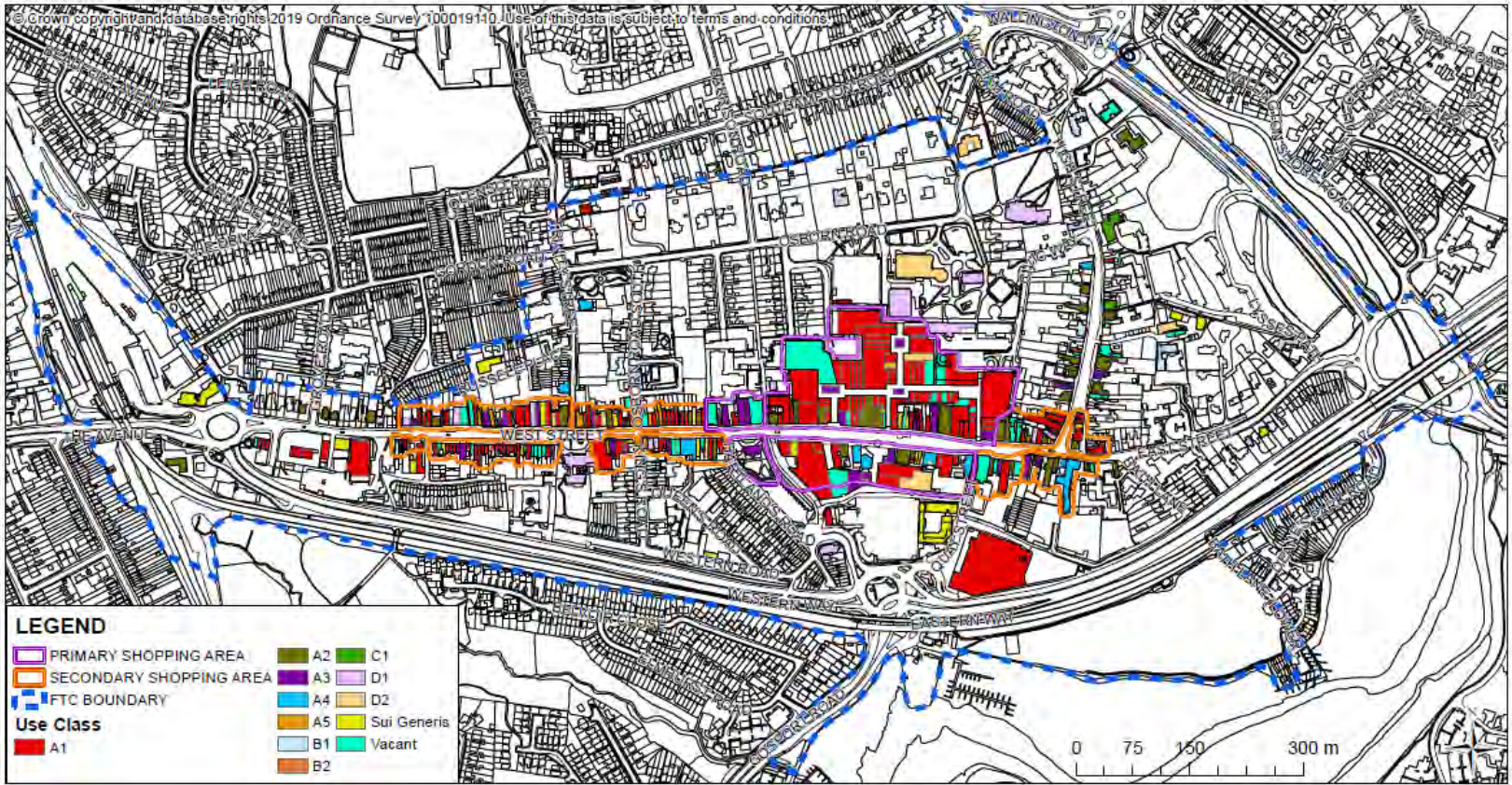
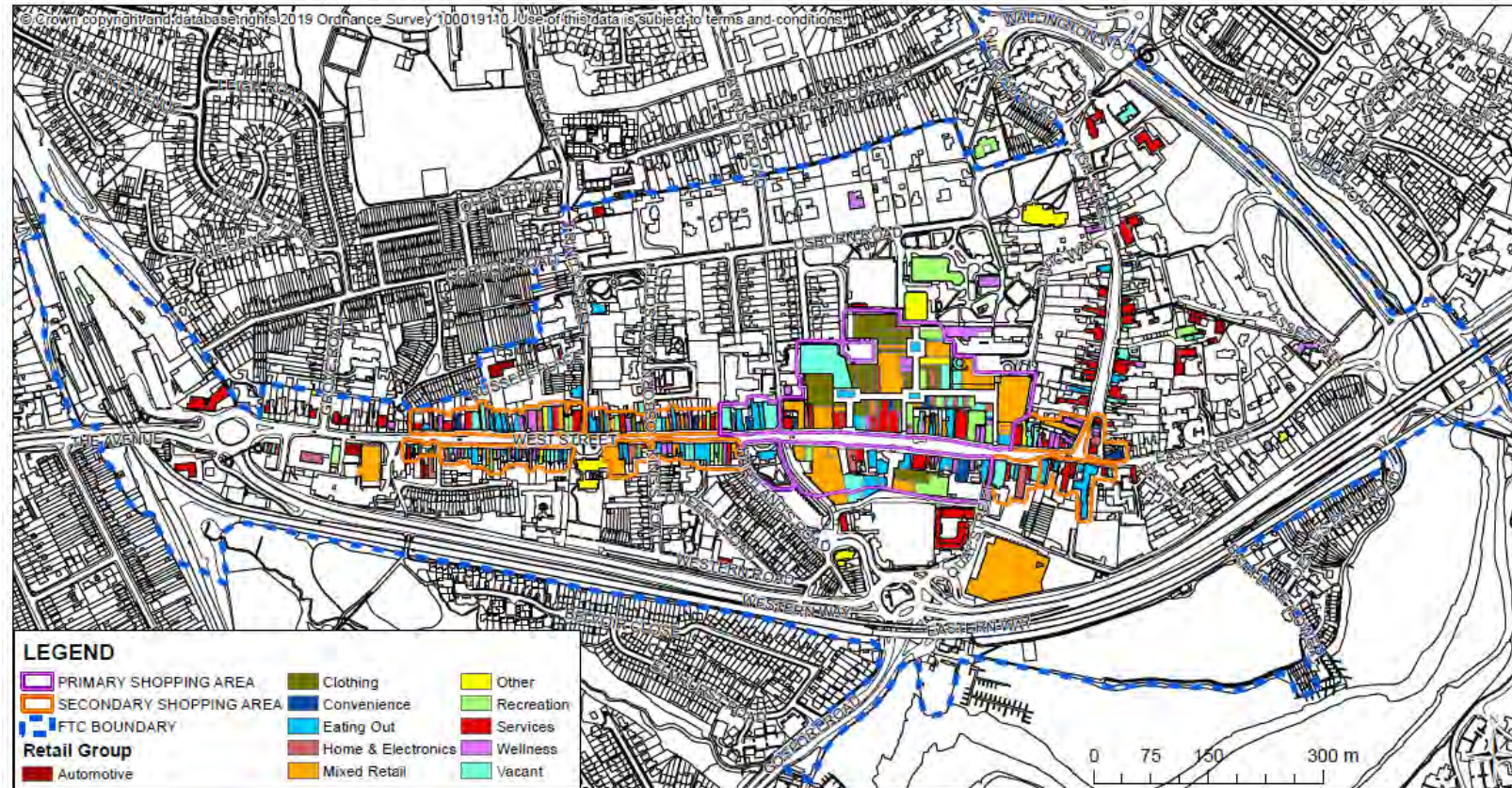


Figure 2: Fareham Town Centre Retail Groups

Fareham Town Centre - Summer 2019



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 decreased slightly during the reporting period from 16 to 14 units. The majority of these (nine) are located in Fareham Shopping Centre and total 4,040 sqm of floorspace or 20.1% of the total shopping centre floorspace. Most of these are clustered in the centre's eastern wing. Fareham Shopping Centre still retains large 'high-street' chain retail outlets including Boots, New Look, Debenhams and Next.

The number of A1 units has slightly increased in the Primary Shopping Area overall with a further two new units this year. These additions were small units, occupied by independent retailers.

In line with the increasing trend for leisure-based activities in the high street, a new D2 use class of a Ping Pong parlour has been introduced into a vacant unit in the shopping centre.

Chart 1 demonstrates that the majority of the Primary Shopping Area floorspace is in A1 use (24,792 sq.m. floorspace, 72.4% of occupied).

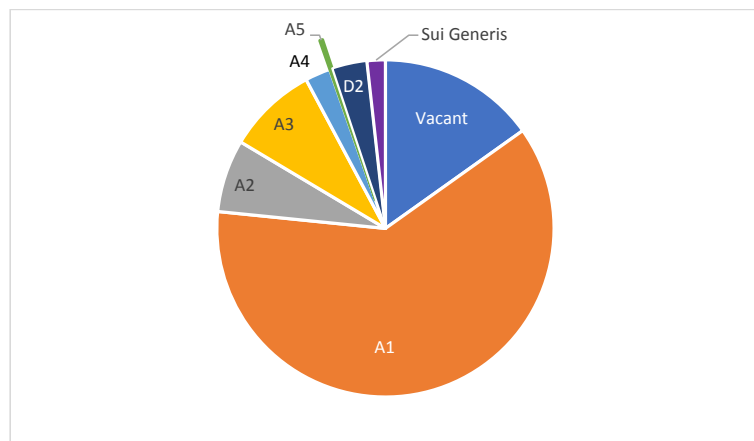


Chart 1: Fareham Town Centre Primary Shopping Area Distribution of Floorspace by Use Class

	No. of units	Change since 2018	% of total units	Floorspace (sqm)
Total	130	+2		40,341
Occupied	116	+4	89.2	34,231
Vacant	14	-2	10.8	6,110
Use Class	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
A1	77	+2	66.4	24,792
A2	11	0	9.5	2,811
A3	16	+1	13.8	3,484
A4	3	0	2.6	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	2	+1	1.7	1,347
Sui Generis	6	0	5.1	711
Retail Group	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	22	-1	19.0	7,701
Convenience	6	0	5.2	948
Eating Out	20	+1	17.2	4,571
Home & Electronics	10	0	8.6	1,267
Mixed Retail	20	+2	17.2	11,479
Other	1	+1	0.9	390
Recreation	10	0	8.6	3,353
Services	15	+1	12.9	3,209
Wellness	12	0	10.4	1,313

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. Therefore, in general, it is likely to experience a high turnover rate as well as temporary vacancies. There is an increase in the number of vacant units in the Secondary Shopping Area, with three additional vacant units this year compared to last summer. 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.

Notably this year there has been an increase in Sui Generis use, or retailers which fall outside other use classes. These increases are from the services sector, i.e. dog grooming and the wellness sector i.e. nail and beauty salons.

Chart 2 shows the diverse distribution of floorspace for different use classes.

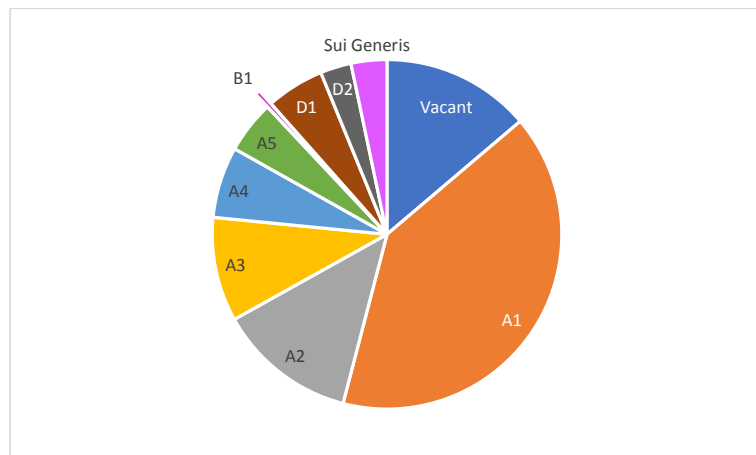


Chart 2: Fareham Town Centre Secondary Shopping Area: Distribution of Floorspace by Use Class

	No. of units	Change since 2018	% of total units	Floorspace (sqm)
Total	154	+2		20,843
Occupied	138	-1	89.6	17,998
Vacant	16	+3	10.4	2,845
Use Class	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
A1	66	-1	47.8	8,299
A2	18	-3	13.0	2,652
A3	17	+1	12.3	1,989
A4	2	-1	1.4	1,357
A5	10	-1	7.2	1,001
B1	1	0	0.7	95
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	9	+1	6.5	1,106
D2	5	0	3.6	591
Sui Generis	10	+5	7.2	683
Retail Group	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	7	-1	5.1	625
Convenience	9	+1	6.5	824
Eating Out	29	0	21.0	4,348
Home & Electronics	14	+1	10.1	1,999
Mixed Retail	13	-1	9.4	2,348
Other	4	-1	2.9	568
Recreation	11	-1	8.0	1,257
Services	22	-2	16.0	3,182
Wellness	29	+3	21.0	2,847

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 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, the same as recorded in the 2018 Retail Health Check. The centre has remained consistent since 2018 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 Co-op, Iceland and Superdrug.

Portchester District Centre provides a variety of retail groups, though there is a predominance of ‘Services’ (23.8%) and ‘Wellness’ (20.6%) units. Although there are only three D1 units, they make up the second largest amount of floorspace (15.3%) after A1 uses (50.6%) due to the sizeable Portchester Health Centre and Portchester Library.

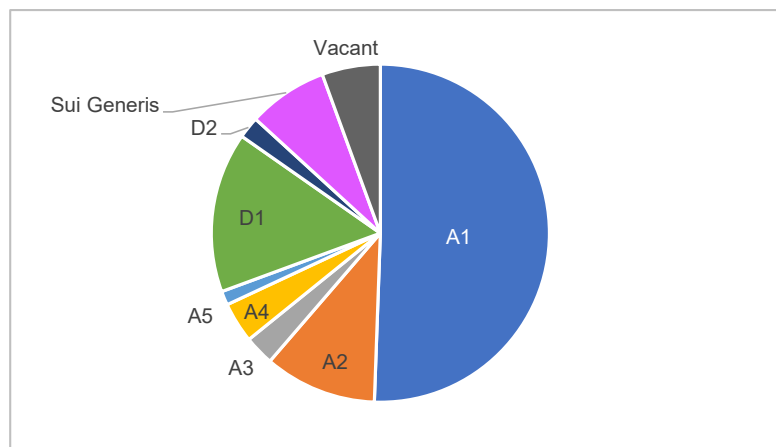


Chart 2: Portchester District Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2018	% of total units	Floorspace (sqm)
Total	69	0		10,238
Occupied	63	0	91.3	9667
Vacant	6	0	8.7	571
Use Class	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
A1	32	0	50.8	5,177
A2	10	0	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	0	4.8	1,569
D2	1	0	1.6	213
Sui Generis	9	0	14.3	781
Retail Group	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
Automotive	1	0	1.6	100
Clothing	1	0	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	0	11.1	1408
Other	4	0	6.3	839
Recreation	7	0	11.1	632
Services	15	0	23.8	1521
Wellness	13	0	20.6	2106

Table 5: 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 nearing completion. 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.



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, 27 of the 28 units are occupied. A1 shops account for over 59% of occupied units and 72% of the floorspace (6,472 sqm), with nearly half the occupied floorspace being used for 'Mixed Retail' goods. Since the 2018 Retail Health Check the centre has seen the loss of 1 A1 unit following the closure of a dry-cleaners.

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.

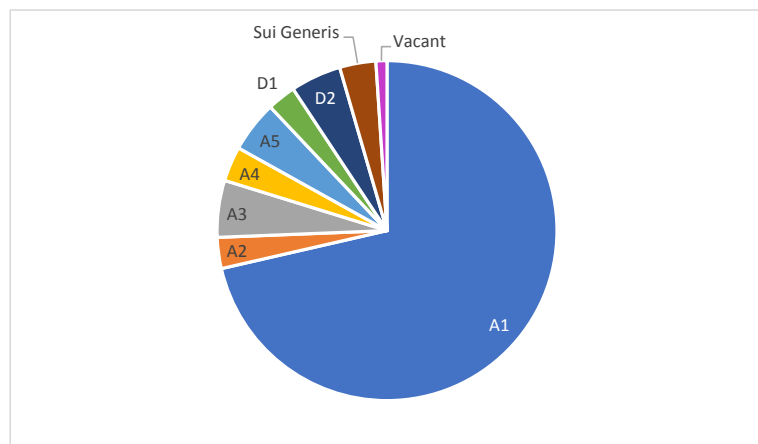


Chart 3: Locks Heath District Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2018	% of total units	Floorspace (sqm)
Total	28	0		9,063
Occupied	27	-1	96.7%	8,968
Vacant	1	+1	3.3%	95
Use Class	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
A1	16	-1	59.3	6,472
A2	2	0	7.4	268
A3	3	0	11.1	490
A4	1	0	3.7	300
A5	2	0	7.4	442
B1	0	0	0.0	0
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	1	0	3.7	247
D2	1	0	3.7	437
Sui Generis	1	0	3.7	312
Retail Group	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	0	0	0.0	0
Convenience	6	0	22.2	1,153
Eating Out	6	0	22.2	1,232
Home & Electronics	0	0	0.0	0
Mixed Retail	4	0	14.8	4,234
Other	4	0	14.8	1,029
Recreation	1	0	3.7	313
Services	3	-1	11.1	386
Wellness	3	0	11.1	621

Table 6: 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 2018 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.

There are 44 units consisting of 5,578 sqm of floorspace in Stubbington Local Centre. The centre predominantly consists of A1 uses; 65.9% of occupied units and 69% of floorspace. Since the 2018 Retail Health Check there have only been minor changes. the vacant unit in the centre has been filled by a Revitalise charity shop meaning the centre now has 100% occupancy.

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 Stubbington Local Centre continues to be stable and successful.

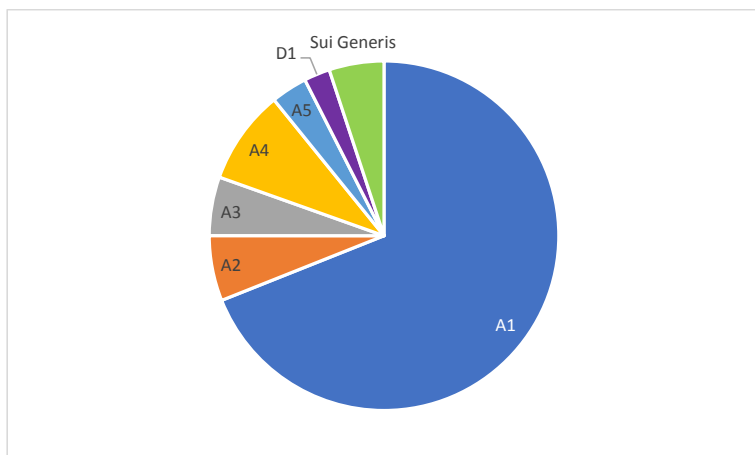


Chart 4: Stubbington Local Centre Distribution of Floorspace by Use Class

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 2018	% of total units	Floorspace (sqm)
Total	44	0		5,578
Occupied	44	+1	100	5,578
Vacant	0	-1	0	0
Use Class	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
A1	29	+1	65.9	3,847
A2	4	0	9.1	337
A3	3	0	6.8	303
A4	1	0	2.3	487
A5	3	0	6.8	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	0	6.8	283
Retail Group	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	2	0	4.5	126
Convenience	7	0	15.9	1,665
Eating Out	7	0	15.9	977
Home & Electronics	1	0	2.3	99
Mixed Retail	7	0	15.9	1003
Other	3	0	6.8	354
Recreation	1	0	2.3	104
Services	8	0	18.2	536
Wellness	8	0	18.2	714

Table 7: Stubbington Local Centre Ground Floor Unit Occupancy



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 58 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 2,441 sqm floorspace. A high proportion of the units are for A1 (36.6%) and A2 (42.4%) and these also make up the majority of the floorspace at 40.7% and 31.2% respectively. Since the 2018 Retail Health Check there has been a loss of one A1 unit and one A2 unit and a gain of one B1 unit as well as one additional Sui Generis use.

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.

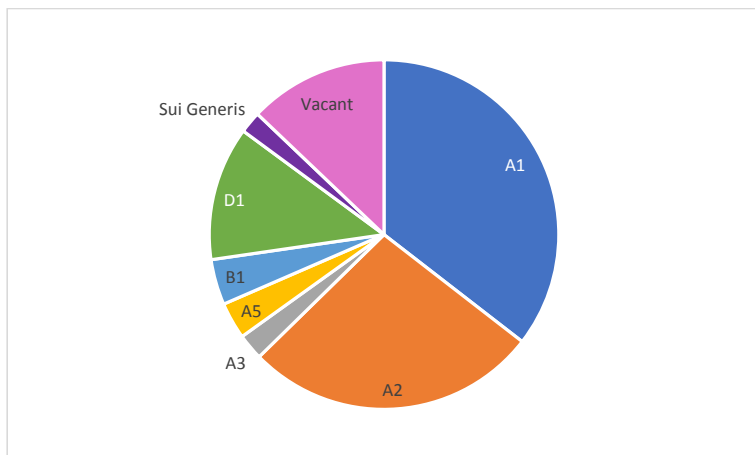


Chart 5: Park Gate Local Centre Distribution of Floorspace by Use Class

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 with A2 uses. The Centre remains compliant with Policy DSP34 as the uses maintain active shop window displays.

	Number of units	Change since 2018	% of total units	Floorspace (sqm)
Total	58	+1		6,947
Occupied	52	0	89.7	6052
Vacant	6	+1	10.3	895
Use Class	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
A1	19	-1	36.6	2,465
A2	22	-1	42.4	1,888
A3	2	0	3.8	168
A4	0	0	0.0	0
A5	2	0	3.8	236
B1	2	+1	3.8	293
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	2	+1	3.8	140
Retail Group	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	1	0	1.9	27
Convenience	1	-1	1.9	229
Eating Out	4	0	7.7	404
Home & Electronics	4	0	7.7	391
Mixed Retail	1	+1	1.9	725
Other	5	+10	9.6	1,049
Recreation	2	0	3.9	129
Services	28	0	53.9	2,441
Wellness	6	0	11.5	657

Table 8: 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 eight units. At the time of the 2019 Retail Health Check there were no vacancies. A1 is the dominant use class in terms of total floorspace at 3 units and 745 sqm floorspace. There has been a division within one of the units with the introduction of a Subway sandwich outlet. There has also been the addition of a community art centre, increasing the number of D2 units.

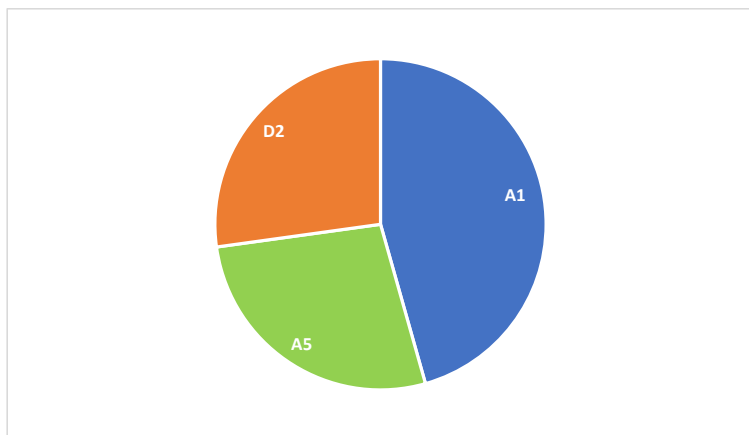


Chart 6: Broadlaw Walk Local Centre Distribution of Floorspace by Use Class

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 2018	% of total units	Floorspace (sqm)
Total	8	+2		1,633
Occupied	8	+2	100.0	1,633
Vacant	0	0	0.0	0
Use Class	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
A1	3	0	37.5	745
A2	0	0	0.0	0
A3	0	0	0.0	0
A4	0	0	0.0	0
A5	3	+1	37.5	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	2	+1	25	444
Sui Generis	0	0	0.0	0
Retail Group	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
Automotive	0	-	0.0	0
Clothing	0	-	0.0	0
Convenience	1	-	12.5	374
Eating Out	3	+1	37.5	444
Home & Electronics	0	-	0.0	0
Mixed Retail	0	-	0.0	0
Other	2	+1	25	444
Recreation	0	-	0.0	0
Services	0	-	0.0	0
Wellness	2	-	25	371

Table 9: 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 2019 Retail Health Check. A1 and A5 are the dominant use classes in the Centre making up over 52% (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%. There have been no changes in any of the units since the 2018 Retail Health Check indicating that the centre is relatively stable and successful.

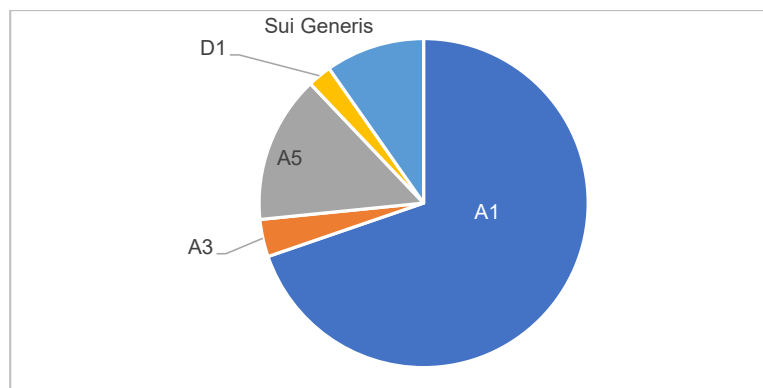


Chart 7: Highlands Road Local Centre Distribution of Floorspace by Use Class

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 2018	% of total units	Floorspace (sqm)
Total	19	-		2,543
Occupied	19	0	100.0	2,543
Vacant	0	0	0.0	0
Use Class	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
A1	9	0	52.6	1,773
A2	0	0	0.0	0
A3	2	0	5.3	93
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 2018	% 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 10: 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 2019 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 2018 Retail Health Check indicating that the centre is relatively stable and successful.

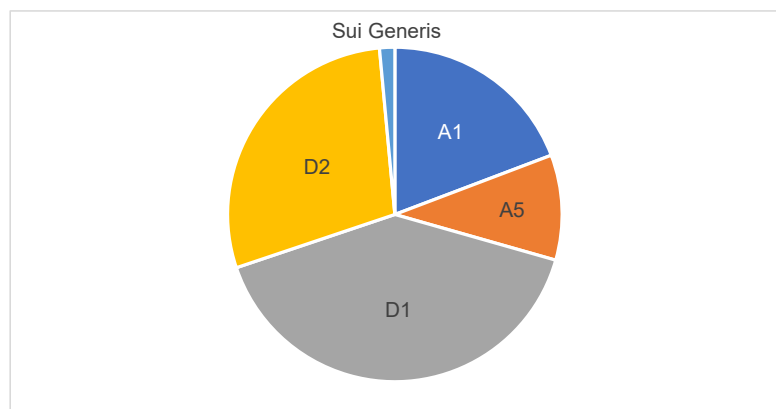


Chart 8: Gull Coppice Local Centre Distribution of Floorspace by Use Class

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 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 2018	% 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 2018	% 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 11: Gull Coppice Local Centre Ground Floor Unit Occupancy

Commented [WG1]: How does this sentence square against the comment in the 'policy monitoring' section?



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 was one vacant unit at the time of the summer 2019 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% 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.

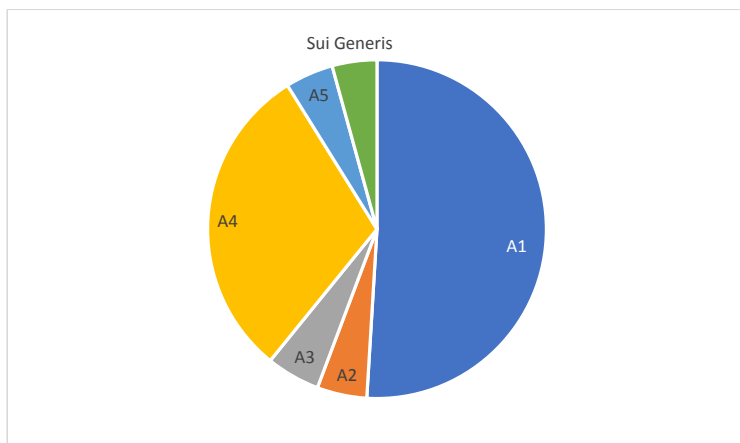


Chart 9: Titchfield Local Centre Distribution of Floorspace by Use Class

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 2018	% of total units	Floorspace (sqm)
Total	24	-		2,479
Occupied	23	-1	95.8	2,437
Vacant	1	+1	4.2	42
Use Class	No. of units	Change since 2018	% occupied units	Floorspace (sqm)
A1	13	-	56.5	1,242
A2	2	-1	8.7	116
A3	2	-	8.7	125
A4	3	-	13.1	738
A5	1	-	4.3	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	-	8.7	104
Retail Group	No. of units	Change since 2018	% 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	3	-1	16.7	200
Wellness	6	-	25.0	401

Table 12: Titchfield Local Centre Ground Floor Unit Occupancy



Figure 17: Titchfield Local Centre Use Classes

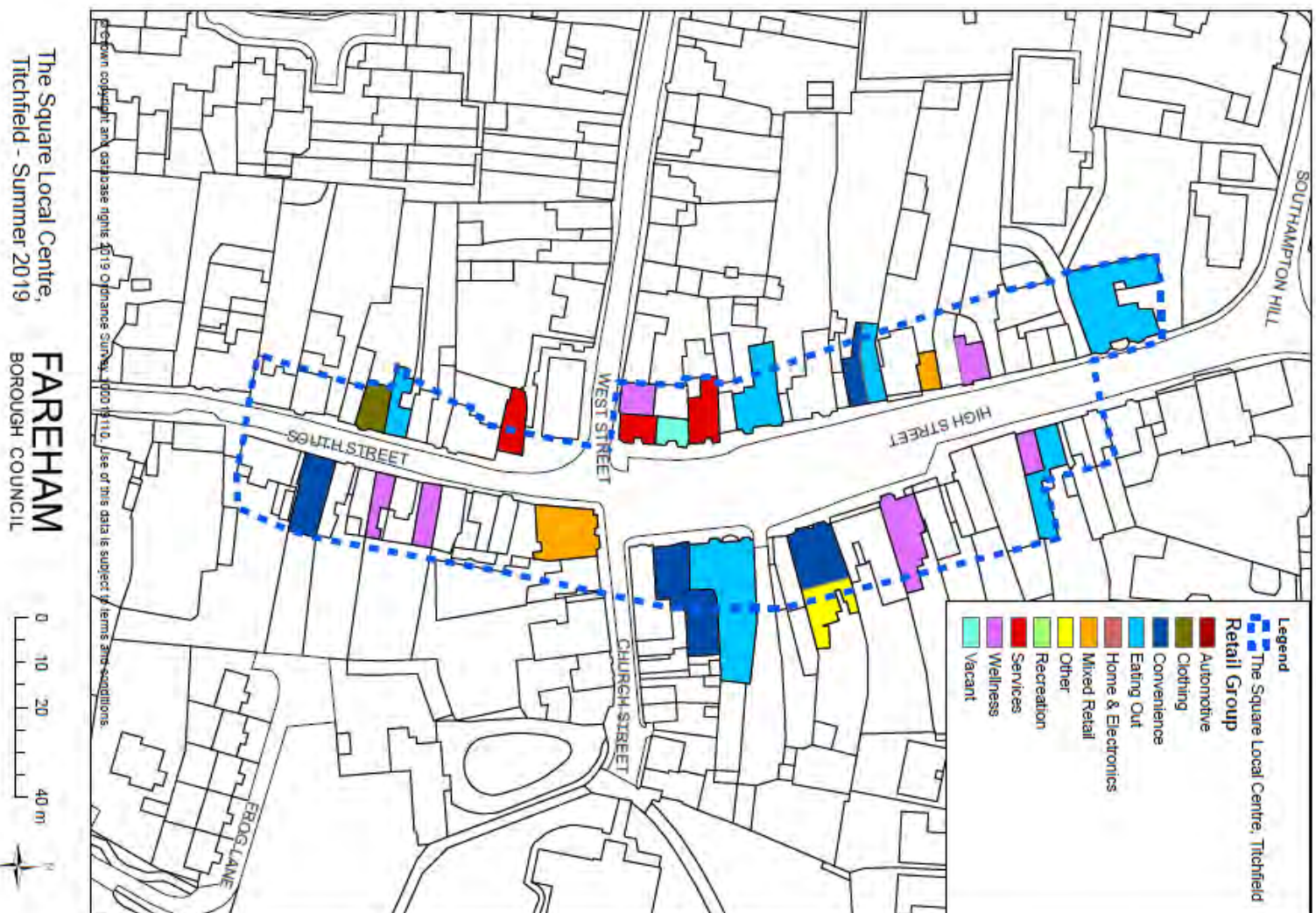


Figure 18: Titchfield Local Centre Retail Groups

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%).

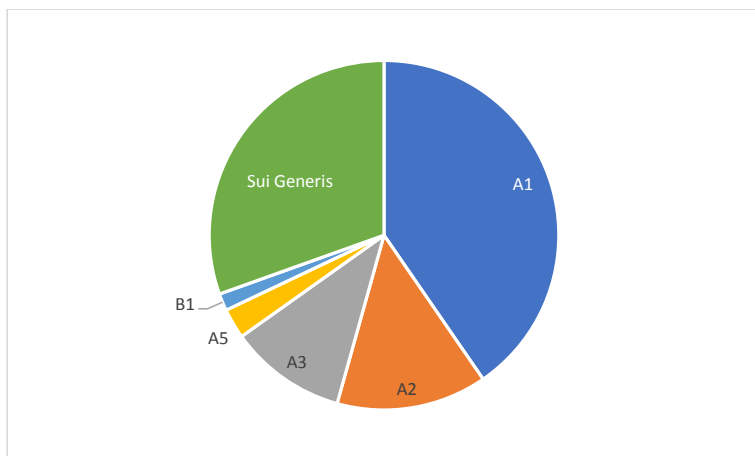


Chart 10: Warsash Local Centre Distribution of Floorspace by Use Class

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 2018	% of total units	Floorspace (sqm)
Total	22	0		3,017
Occupied	22	0	100.0	3,017
Vacant	0	0	0.0	0
Use Class	No. of units	Change since 2018	% of occupied units	Floorspace (sqm)
A1	11	0	50.0	1,219
A2	2	0	9.1	420
A3	3	0	13.6	327
A4	0	0	0.0	0
A5	1	0	4.5	84
B1	1	0	4.5	48
B2	0	0	0.0	0
C1	0	0	0.0	0
D1	0	0	0.0	0
D2	0	0	0.0	0
Sui Generis	4	0	18.2	919
Retail Group	No. of units	Change since 2018	% of occupied units	Floorspace (sqm)
Automotive	2	-	9.1	828
Clothing	2	-	9.1	130
Convenience	1	-	4.5	411
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 13: 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 20th, Saturday 22nd and Monday 24th June 2019; 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.

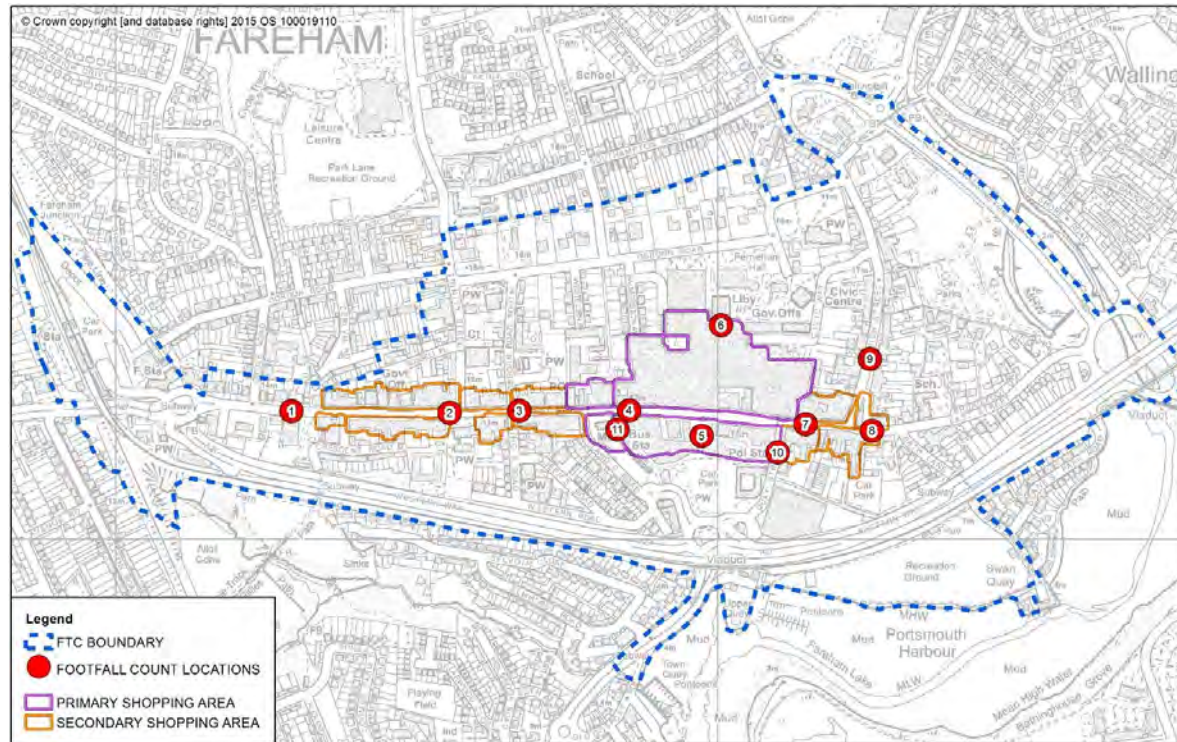


Figure 21: Footfall Count Locations - Fareham Town Centre

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 19,344 in 2019, a drop of 39.2%. Footfall in summer 2016 peaked in comparison to the trend from 2013 to 2015, whereas counts in 2018 and 2019 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 had 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%. The footfall for Saturday in 2019 has shown a small recovery, increasing to 6,972, a rise of 3.2%. 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 2019, although the Saturday count was higher than the regular weekday, the difference was much lower, being 8.8%.

The change in footfall on market day since the spike in 2016 has been significant, with a drop of 38.8% from 31,608 to 19,344 in 2019. The decrease in footfall between 2018 and 2019 for market day was 25%. This indicates that the market is not providing a significant draw to the town centre.

The decrease in footfall in Fareham follows the UK trend indicated by the Retail Health Index² which reveals that the health of UK retail has continued to deteriorate as the popularity of online shopping increases and consumer spending changes from the purchase of goods to experiences.

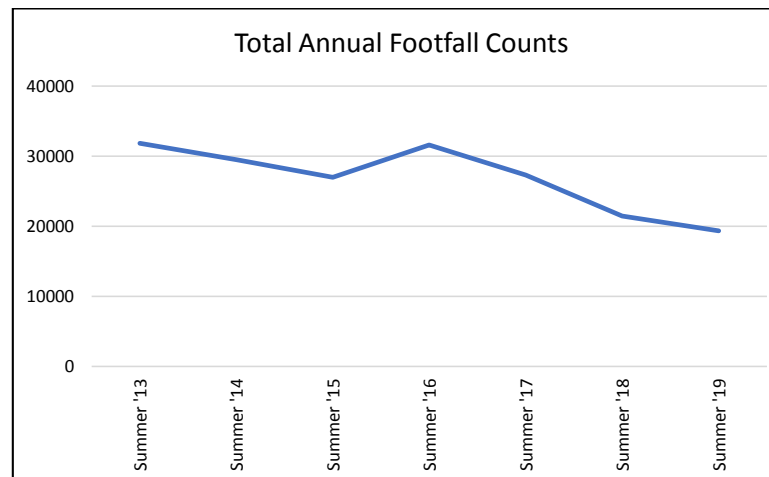


Figure 22: Fareham Town Centre Total Annual Footfall

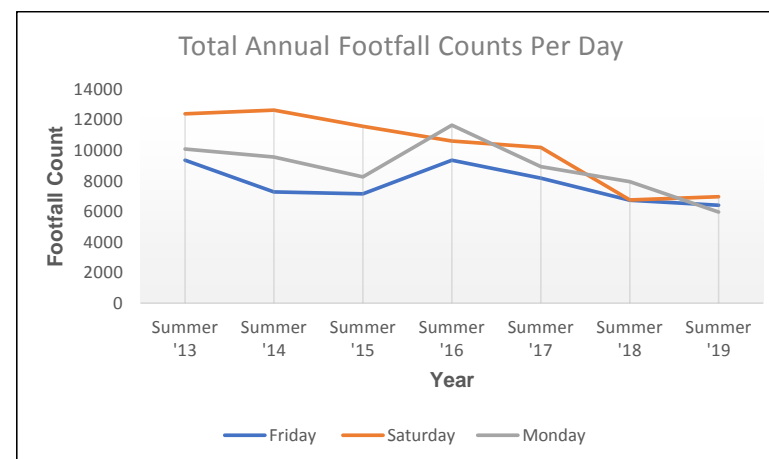


Figure 23: Fareham Town Centre Total Annual Footfall by Day

² <http://www.retailthinktank.co.uk/retail-health-index/>

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 120	W: 192	312
2	E: 204	W: 180	384
3	E: 252	W: 168	420
4	E: 804	W: 636	1440
5	N: 288	S: 456	744
6	N: 456	S: 528	984
7	E: 264	W: 444	708
8	E: 72	W: 96	168
9	N: 144	S: 84	228
10	N: 204	S: 300	504
11	N: 264	S: 252	516

Table 14: Fareham Town Centre Footfall count per hour: Thursday 20th June 2019

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 156	W: 72	228
2	E: 360	W: 180	540
3	E: 492	W: 300	792
4	E: 840	W: 708	1548
5	N: 456	S: 576	1032
6	N: 396	S: 408	804
7	E: 264	W: 420	684
8	E: 108	W: 36	144
9	N: 84	S: 120	204
10	N: 372	S: 228	600
11	N: 204	S: 192	396

Table 15: Fareham Town Centre Footfall count per hour: Saturday 22nd June 2019

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 192	W: 84	276
2	E: 156	W: 264	420
3	E: 216	W: 180	396
4	E: 324	W: 240	564
5	N: 216	S: 252	468
6	N: 804	S: 672	1476
7	E: 336	W: 552	888
8	E: 72	W: 84	156
9	N: 168	S: 60	228
10	N: 156	S: 396	552
11	N: 336	S: 204	540

Table 16: Fareham Town Centre Footfall count per hour: Monday 24th June 2019

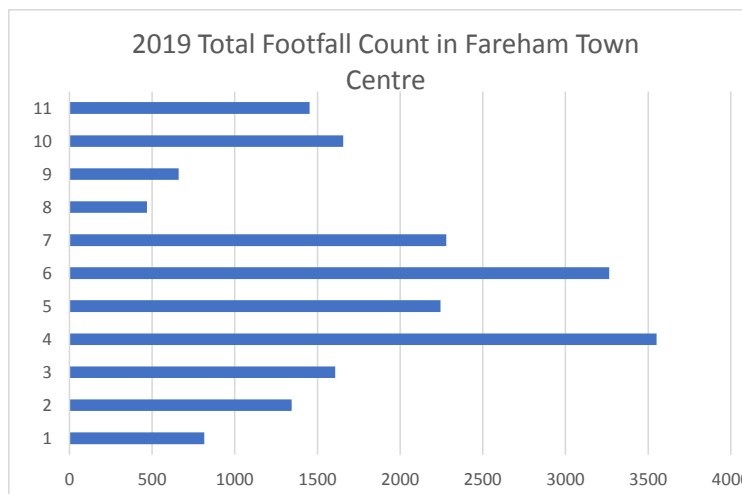


Figure 24: Fareham Town Centre Total Footfall Count at Each Location

Portchester District Centre: Footfall Count

Method

This is the second 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 19th June, Thursday 20th June and Saturday 24th June 2019 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. When compared to 2018, there has been an overall decrease in footfall of 20%. In particular, market day saw a decrease from 2,580 to 1,884, a drop of 26%.

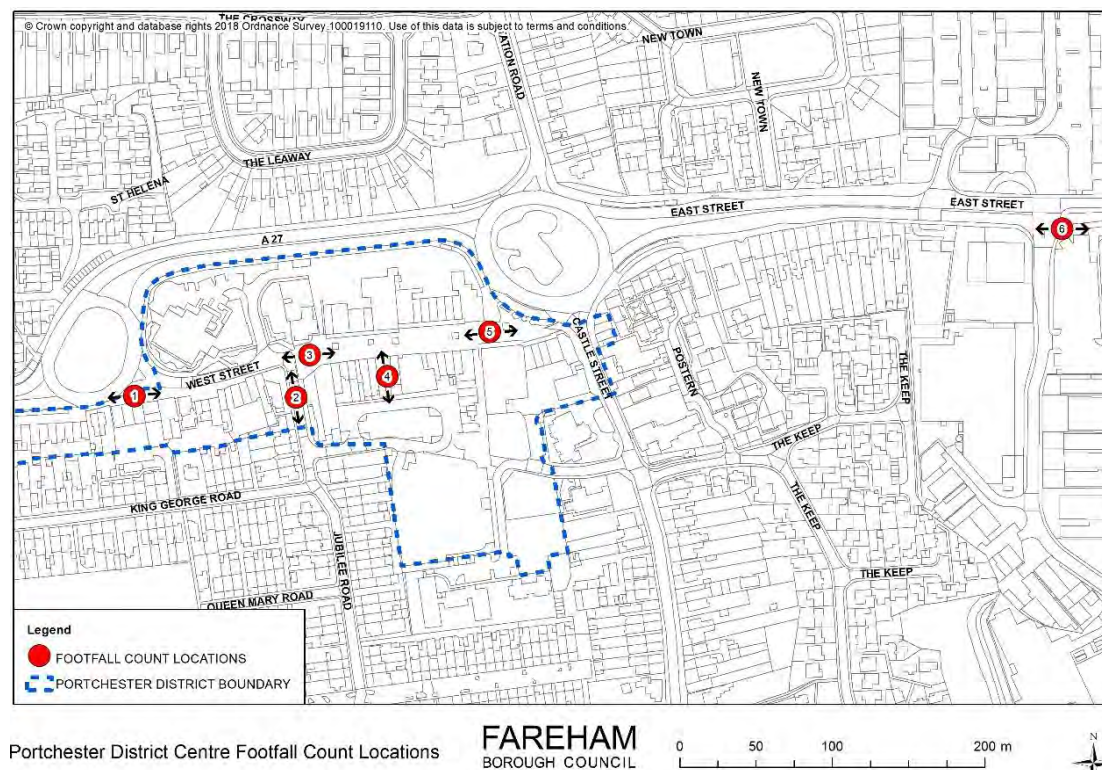


Figure 25: Footfall Count Locations: Portchester District Centre

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 144	W: 156	300
2	N: 24	S: 24	48
3	E: 228	W: 240	468
4	N: 216	S: 204	420
5	E: 228	W: 288	516
6	E: 96	W: 36	132

Table 17: Portchester District Centre Footfall count per hour: Wednesday 19th June 2018

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 24	W: 72	96
2	N: 36	S: 24	60
3	E: 96	W: 180	276
4	N: 84	S: 48	192
5	E: 168	W: 156	324
6	E: 24	W: 12	36

Table 18: Portchester District Centre Footfall count per hour: Thursday 20th June 2018

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 84	W: 48	132
2	N: 36	S: 96	132
3	E: 336	W: 192	528
4	N: 180	S: 180	360
5	E: 180	W: 96	276
6	E: 24	W: 24	48

Table 19: Portchester District Centre Footfall count per hour: Saturday 24th June 2018

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

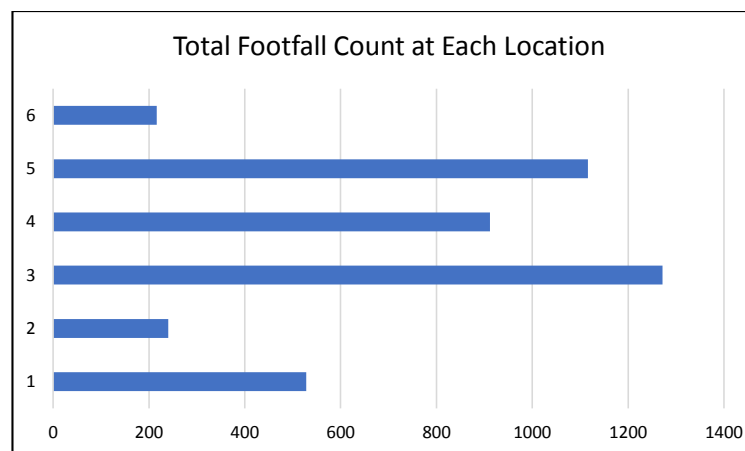


Figure 26: Portchester District Centre Total Footfall Count at Each Location

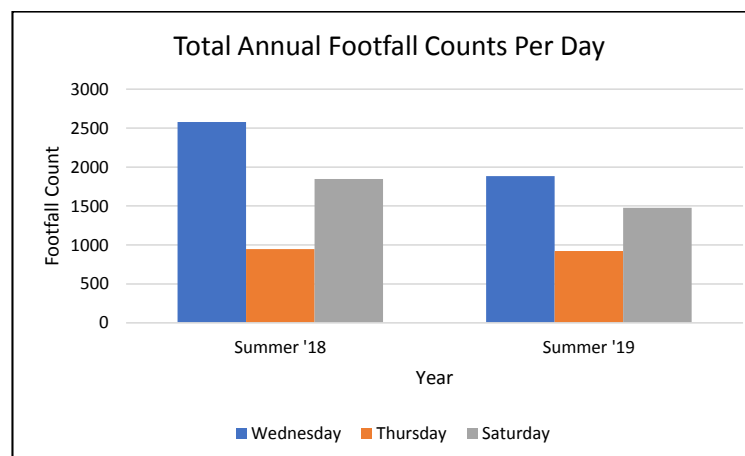


Figure 27: Portchester District Centre Total Footfall Count by Day