

Fareham Borough Retail Health Check

Summary Paper 2021

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Introduction

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

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

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

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

The data collection for this health check was undertaken in June 2021.

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 units.	Annually (Summer)	Review by observation
Commercial yields on non-domestic property	Demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments.	Ongoing	Local Plan evidence studies.
Customers' views and behaviour	Regular surveys to help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities.	Ongoing	Local Plan evidence studies/consultation.
Retailer representation and intentions to change representation	Existence and changes in representation of retailer, including street markets, and the demand of retailers wanting to come into the centre.	Ongoing	Local Plan evidence studies.
Commercial rents	Demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments.	Ongoing	Local Plan evidence studies.
Pedestrian flows	A key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets.	Annually (Summer) for Fareham Town Centre & Portchester District Centre	Footfall counts at set locations.
Accessibility	Ease and convenience of access by a variety of travel options, including – the quality, quantity and type of car parking; the frequency and quality of public transport, the quality of provision for pedestrians, cyclists and disabled people.	Ongoing	Accessibility Background Paper
Perception of safety and occurrence of crime	Views and information on safety and security, and where appropriate, information for monitoring the evening and night-time economy.	Ongoing	Local Plan evidence studies.
State of town centre environmental quality	Includes information on problems (air pollution, noise, clutter, litter and graffiti) and positive factors (trees, landscaping and open spaces).	Ongoing	Local Plan evidence studies.
Balance between independent and multiple stores	The ratio of independent stores to multiple/high street chain stores.	Annually (summer)	Review by observation

Evidence of barriers to new businesses opening and existing businesses expanding	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
Evening and night-time economy offer	The amount of space in use for different uses such as restaurants, cinemas and performance venues	Annually (Summer)	Reviewed by observation

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 2037 (Emerging)

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

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

¹ http://www.fareham.gov.uk/PDF/planning/local_plan/LocalDevelopmentScheme2021.pdf

Diversity of Uses

Council officers collected data on the use of each non-residential unit in the Borough's main shopping centres (town centres, district centres and local centres). From this, every occupied unit was attributed a use class, providing an overall picture that demonstrates the diversity of uses in each centre. The basic definitions of the use classes frequently referred to in this document are set out in Table 2. This Retail Health Check took place in June 2021 and is the first to take place since the amendment to the Town and Country Planning Use Classes Regulations² which took effect in September 2020. The chart below provides an explanation of the changes.

Planning Use Class prior to Sept 2020	Definition of Use	Amended use classes
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.	E
A1	Shop not more than 280sqm mostly selling essential goods, including food and at least 1km from another similar shop.	F2
A2	Financial or professional services (other than health/medical services) or any services including betting office.	E
A3	Restaurants and cafes. Sale of food and drink for consumption ON the premises.	E
A4	Pubs, bars or other drinking establishments.	Sui Generis
A5	Takeaways. Sale of hot food for consumption OFF the premises.	Sui Generis
B1	Business. Office (other than an A2 use), research and development of products and processes, studios, laboratories, high tech, any light industry.	E
B2	General industry. Industry other than that falling within B1.	B2
C1	Hotel, boarding or guest house where no significant element of care is provided.	C1
C2	Residential accommodation and care to people in need of care, hospital nursing home or residential school.	C2
D1	Clinics, health centres, creches, day nurseries, day centre.	E

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

D1	Schools, non-residential education and training centres, museums, public libraries, public halls, exhibition halls, places of worship, law courts	F1
D2	Cinemas, concert halls, bingo halls and dance halls.	Sui Generis
D2	Gymnasiums, indoor recreations not involving motorised vehicles or firearms	E
D2	Hall or meeting place for the principal use of the local community	F2
D2	Indoor or outdoor swimming baths, skating rinks, and outdoor sports or recreations not involving motorised vehicles or firearms	F2
Sui-generis	Uses that do not easily fall into any of the use class listed above, such as car showrooms/repair facilities, laundrettes, taxi business etc	Sui Generis

Table 2: Use Class Definitions

The data collected for this retail health check has been redefined under the amended use classes. This means that for this year, the changes between use class which have taken place between 2020 and 2021 are not represented.

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

- **Automotive** (inc. car sales and repair)
- **Clothing** (inc. jewellery, shoes and accessories)
- **Convenience** (inc. food stores, bakers, butchers)
- **Eating Out** (inc. takeaways, restaurants, pubs)
- **Home & Electronics** (inc. furniture and appliances, mobile phones)
- **Mixed Retail** (inc. department stores, charity shops, large supermarkets)
- **Other** (inc. church, vets and others that fit no other category)
- **Recreation** (inc. sporting goods, cinemas, gyms)
- **Services** (inc. banks, estate agents, hotels)
- **Wellness** (inc. dentists, hairdressers, opticians)

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

Centre Analysis

Fareham Town Centre

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

There are 370 units in Fareham Town Centre. 48 units (13%) are vacant. Although the number of vacancies has not increased, there has been an overall increased vacancy seen in the floorspace, with larger units within the primary shopping area closing, such as Robert Dyas and Debenhams. This has resulted in an increase of vacant floorspace of over 1,900sqm. Overall, vacancies in the town centre have been increasing since 2015, with the vacant floorspace standing at 14.7%.

The majority of the units within the town centre fall into class E of the new use class definitions with 77% of the occupied floor space in this classification, followed by 16% of the occupied floorspace being Sui Generis.

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

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	370	0		89,484
Occupied	322	0	87	76,302
Vacant	48	0	13	13,181
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	257		45.0	59,012
B2	2		0.6	182
C1	1		0.6	564
F1	7		7.5	4,049
Sui Generis	55		8.7	12,495
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	6	0	1.9	1,387
Clothing	20	-2	6.2	6,509
Convenience	15	+1	4.6	1,757
Eating Out	56	0	17.4	9,775
Home & Electronics	22	-1	6.9	3,010
Mixed Retail	40	-1	12.4	20,177
Other	10	-1	3.1	4,636
Recreation	22	0	6.9	6,830
Services	75	+1	23.2	14,989
Wellness	56	+3	17.4	7,232

Table 3: Fareham Town Centre Ground Floor Unit Occupancy

Fareham Town Centre - Summer 2021

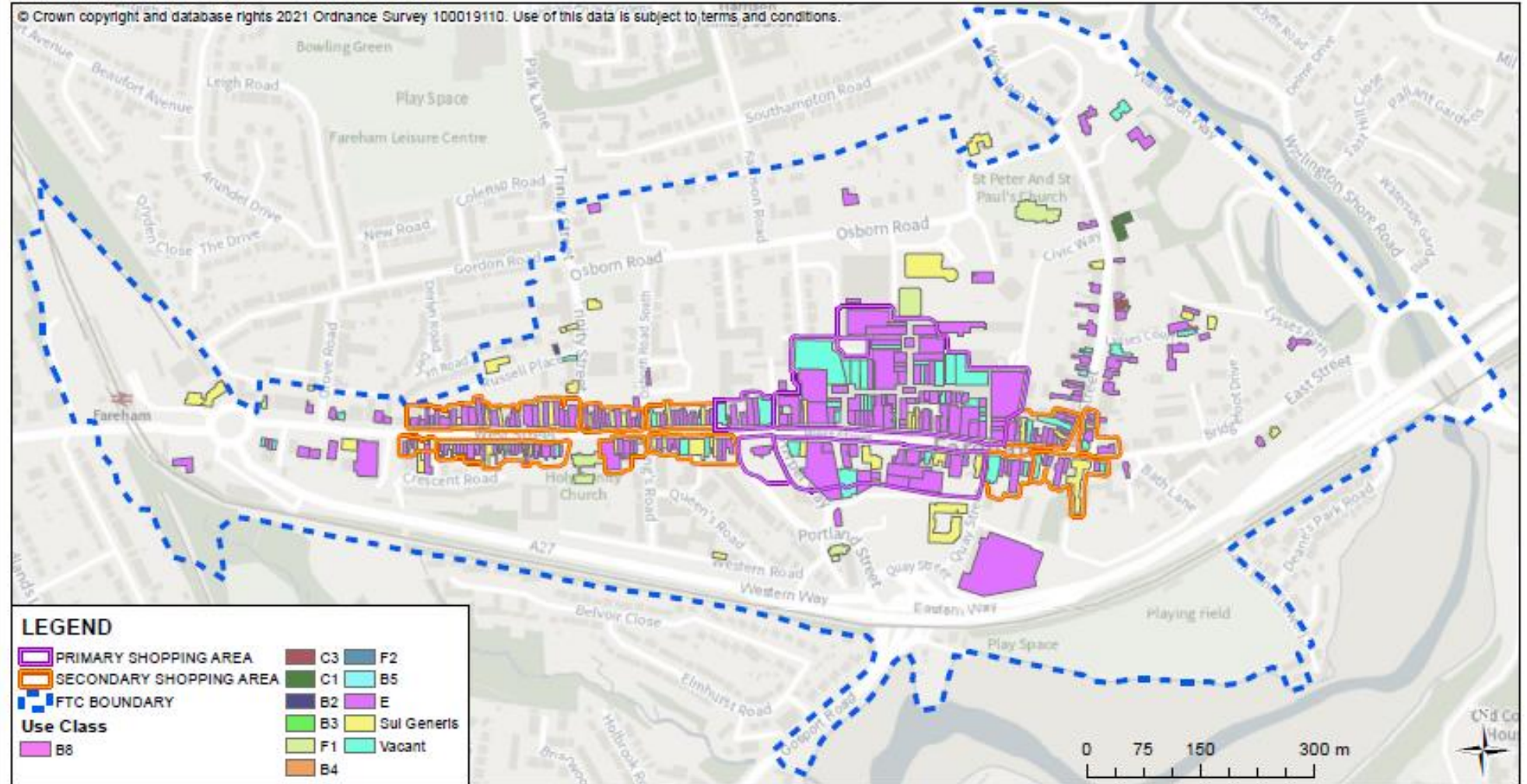


Figure 1: Fareham Town Centre Use Classes

Fareham Town Centre - Summer 2021

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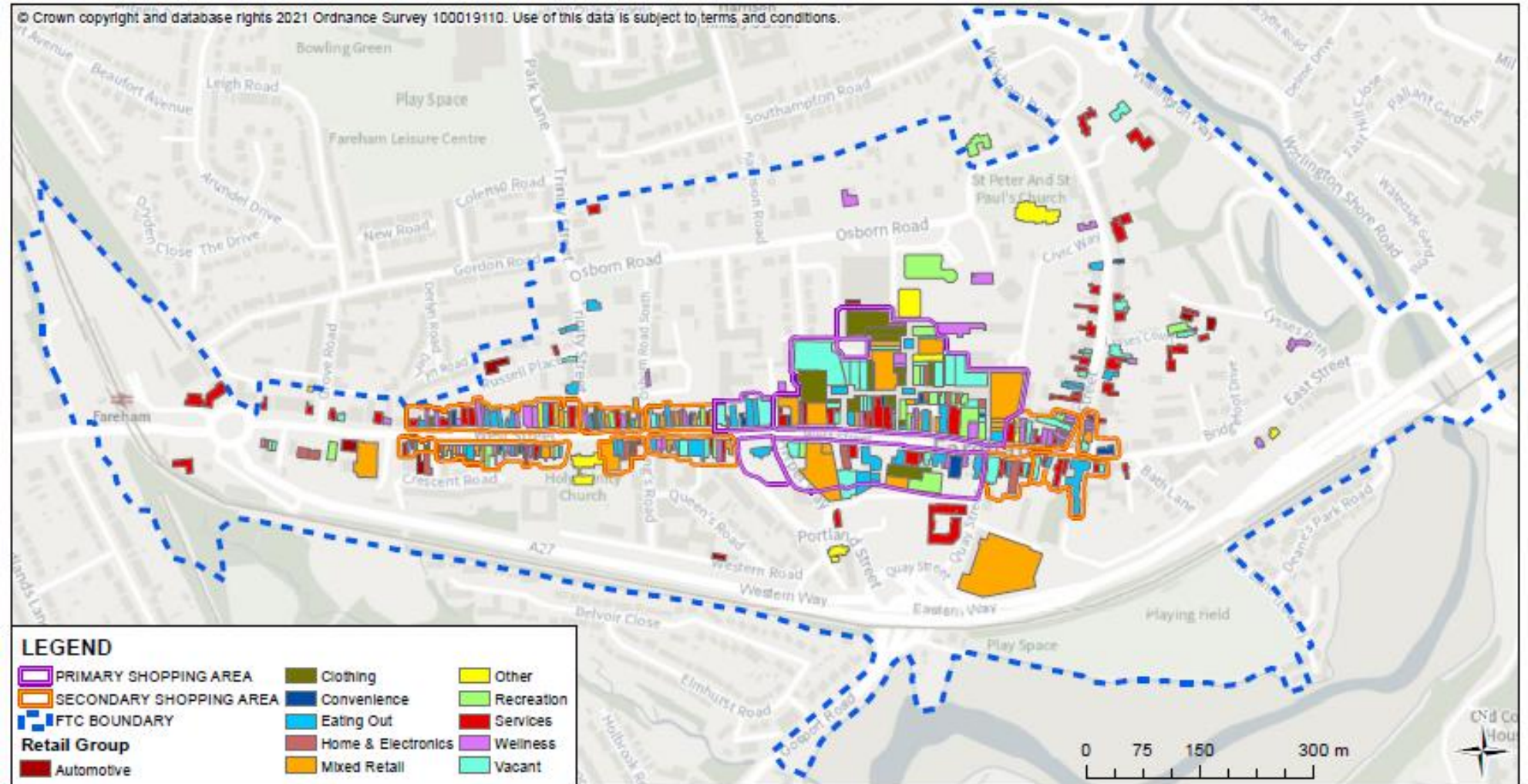


Figure 2: Fareham Town Centre Retail Groups

Primary Shopping Area

The Primary Shopping Area has a total floorspace of 40,341 sqm. The amount of vacant floorspace in the primary area has increased significantly during the reporting period from 7,843sqm to 9,522sqm, an increase of 1600sqm. The majority of the primary shopping area vacancies (twenty) are located in Fareham Shopping Centre, being 7,160sqm of floorspace or 31% of the total shopping centre's floorspace. The significant losses include 'high-street' chain retail outlets Debenhams and Dorothy Perkins.

The retail groups most affected are Mixed Retail with a loss of 3 units comprising over 1,400sqm of floor space and Clothing, with a loss of 2 units and just over 500sqm.

As shown in the graph below, the overall primary shopping area now has 23.6% of floorspace vacant.

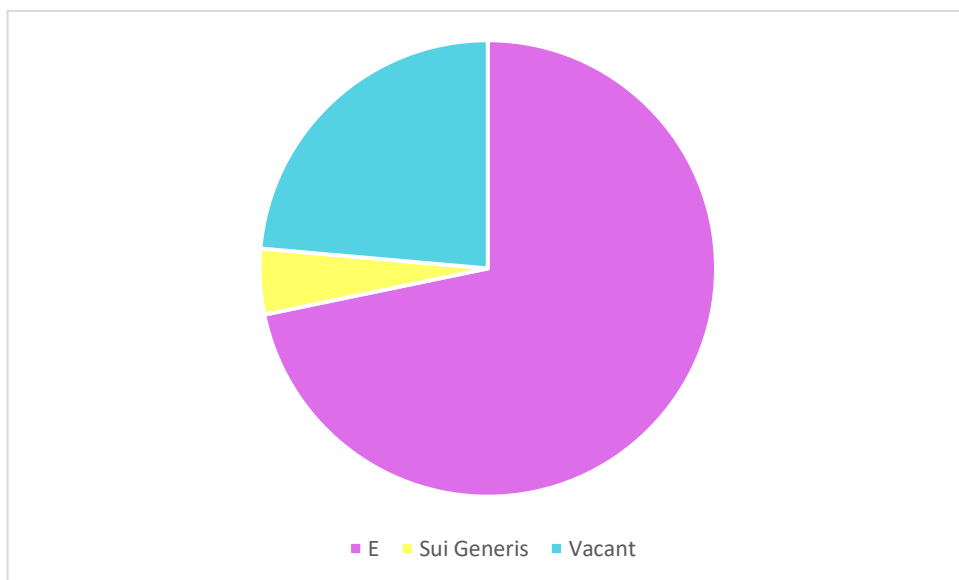


Chart 1: Fareham Town Centre Primary Shopping Area Distribution of Floorspace by Use Class

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	130	-1		40,341
Occupied	104	-2	80	30,818
Vacant	26	+1	20	9,522
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	94		90.4	28,945
Sui Generis	10		9.6	1,873
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	14	-2	13.5	5,943
Convenience	6	0	5.8	889
Eating Out	21	+1	20.2	4,631
Home & Electronics	9	0	8.7	1,160
Mixed Retail	18	-3	17.3	10,084
Other	1	0	0.9	391
Recreation	11	+1	10.5	3,449
Services	14	0	13.5	3,088
Wellness	10	+1	9.6	1,183

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

Secondary Shopping Area

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

The Secondary Shopping Area has shown an increase of 6 in the number of occupied units. The total number of units has also increased although the floorspace has not, due to the sub-division of larger units. The majority of units fall into the new E use class.

Some changes can be seen in the types of retail groups, with increases in mixed retail, services and wellness.

Chart 2 shows the lower vacancy rate seen in the Secondary Shopping Area at 8.3%.

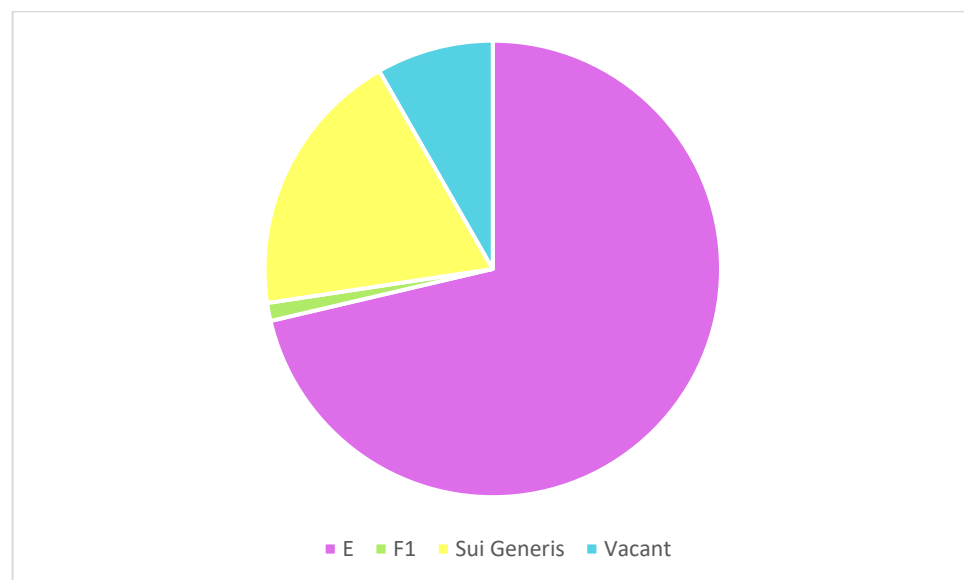


Chart 2: Fareham Town Centre Secondary Shopping Area: Distribution of Floorspace by Use Class

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	157	+3		20,843
Occupied	144	+6	91.7	18,427
Vacant	13	-3	8.3	2,416
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	112		77.8	1,106
F1	2		1.4	361
Sui Generis	30		20.8	4,160
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	6	0	4.2	565
Convenience	8	+1	5.5	799
Eating Out	28	-1	19.4	3,996
Home & Electronics	10	0	6.9	1,436
Mixed Retail	20	+3	13.9	2,848
Other	3	-1	2.1	467
Recreation	7	-1	4.9	945
Services	27	+3	18.8	3,728
Wellness	35	+2	24.3	3,643

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

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 71 units totalling 10,334 sqm floorspace, making it the second largest retail centre in the Borough.

At the time of the survey, 5 units (1,219 sqm floorspace) were vacant. Although the number of vacant units has increased by 1, the vacant floorspace has decreased by 215sqm. The majority of occupied units (93%) are in use class E and include “high-street” retailers such as The Card Factory, Iceland, Tesco Express and Superdrug.

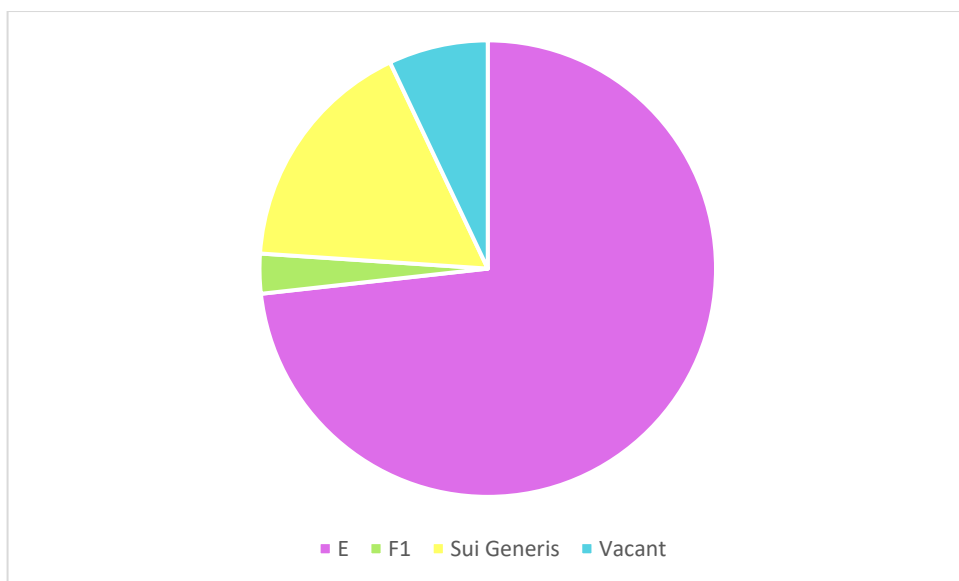


Chart 2: Portchester District Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	71	+1		10,334
Occupied	66	0	93.0	9,115
Vacant	5	+1	7.0	1,219
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	52		78.8	7,224
F1	2		3.0	698
Sui Generis	12		18.2	1,193
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	1	0	1.5	100
Clothing	2	+1	3.0	143
Convenience	4	-1	6.1	772
Eating Out	8	0	12.1	825
Home & Electronics	3	+1	4.6	372
Mixed Retail	7	0	10.6	1,408
Other	4	0	6.1	839
Recreation	8	0	12.1	710
Services	14	-1	21.2	1,469
Wellness	15	+2	22.7	2,262

Table 6: Portchester District Centre Ground Floor Unit Occupancy

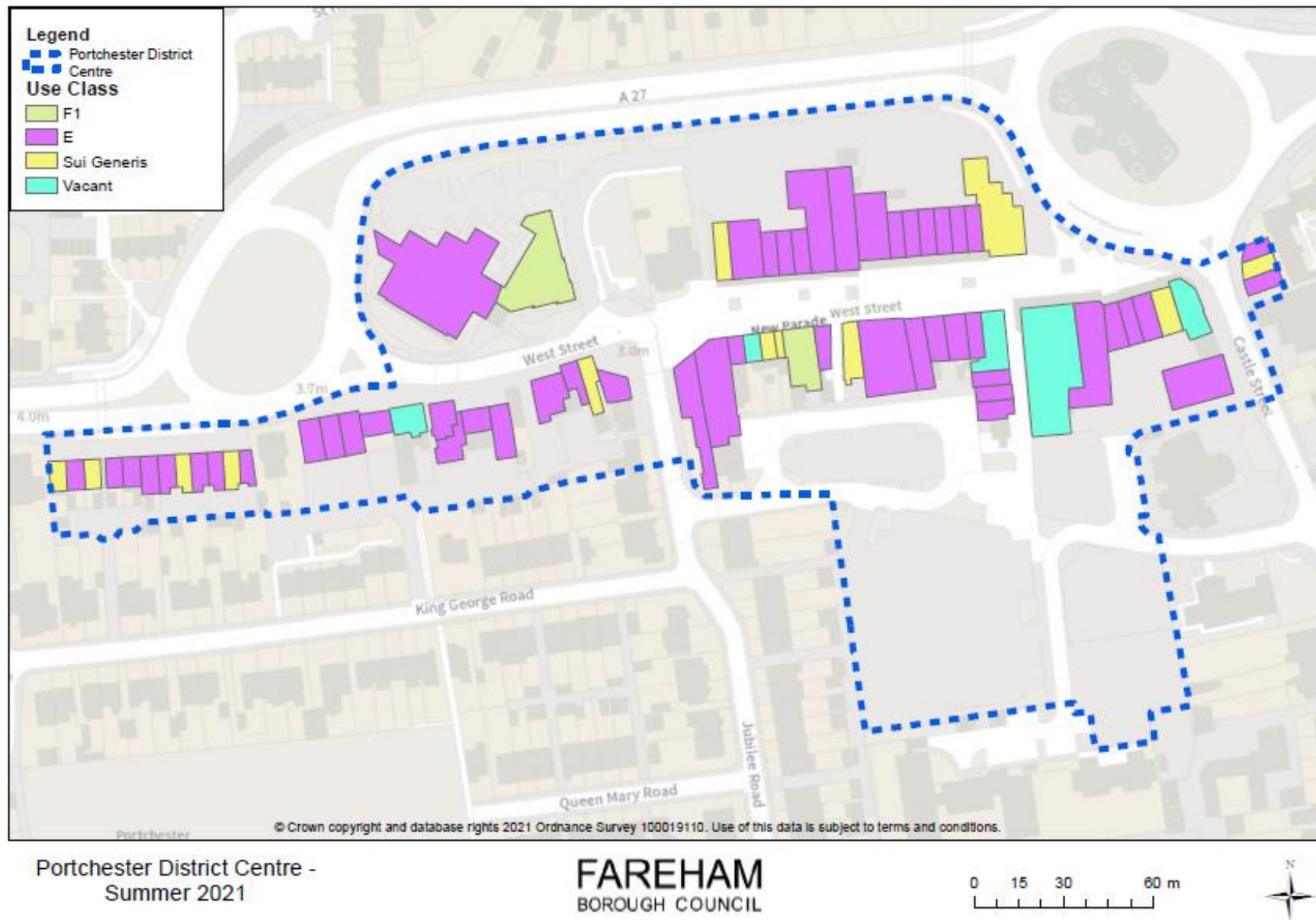
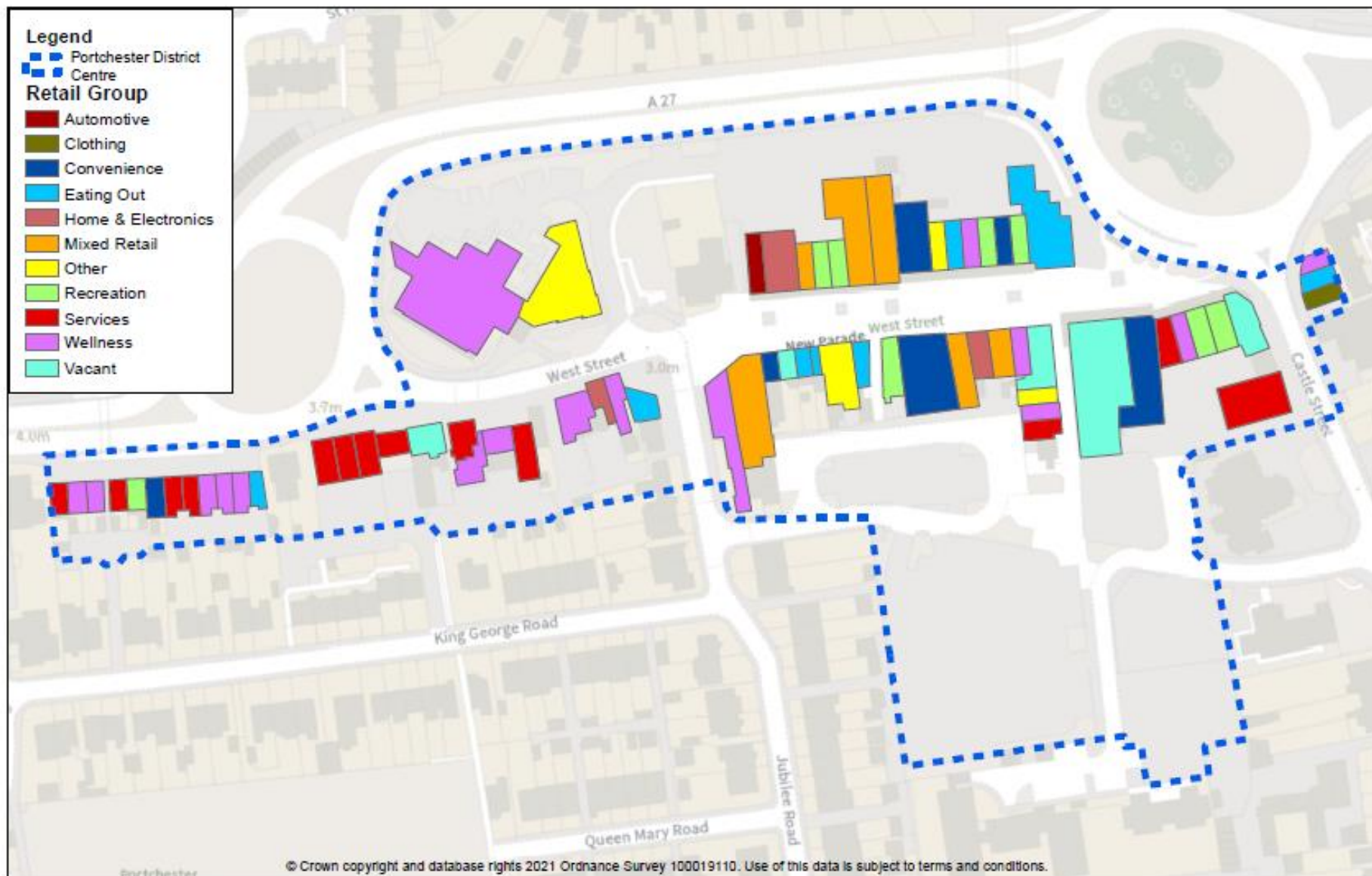


Figure 3: Portchester District Centre Use Classes



Portchester District Centre -
Summer 2021

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Figure 4: Portchester District Centre Retail Groups

Locks Heath District Centre

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

There have been 2 new vacancies since 2020 however the vacancy rate remains low at 6.7%. The majority of occupied units fall within the new E use class.

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.

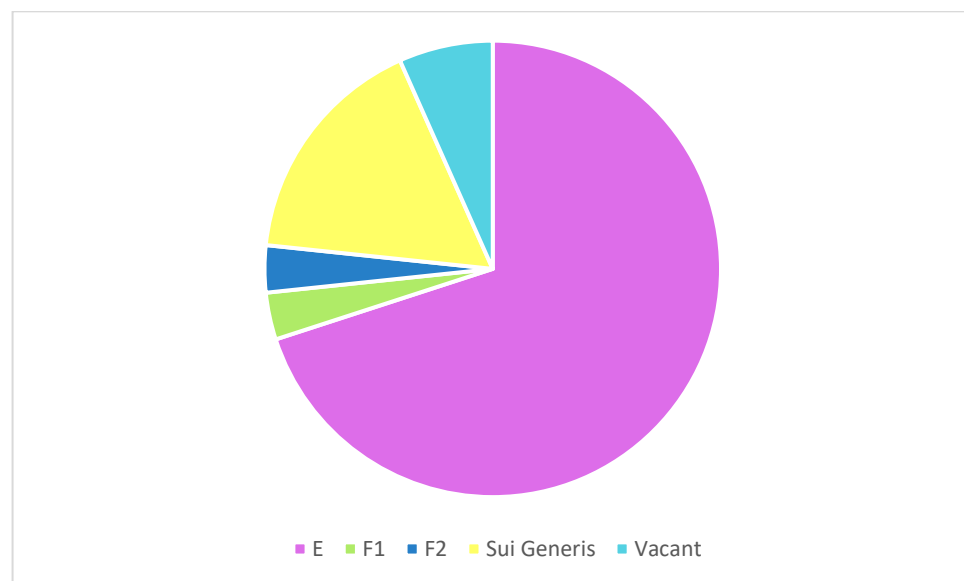


Chart 3: Locks Heath District Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	30	0		9,364
Occupied	28	-2	93.3	9,084
Vacant	2	+2	6.7	280
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	21		75.0	7,114
F1	1		3.6	246
F2	1		3.6	437
Sui Generis	5		17.8	1,287
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	0	0	0.0	0
Convenience	7	0	25	1,223
Eating Out	5	-1	17.8	1,072
Home & Electronics	0	0	0.0	0
Mixed Retail	5	0	17.8	4,421
Other	4	0	14.3	1,029
Recreation	2	0	7.2	452
Services	2	-1	7.2	266
Wellness	3	0	10.7	621

Table 7: Locks Heath District Centre Ground Floor Unit Occupancy

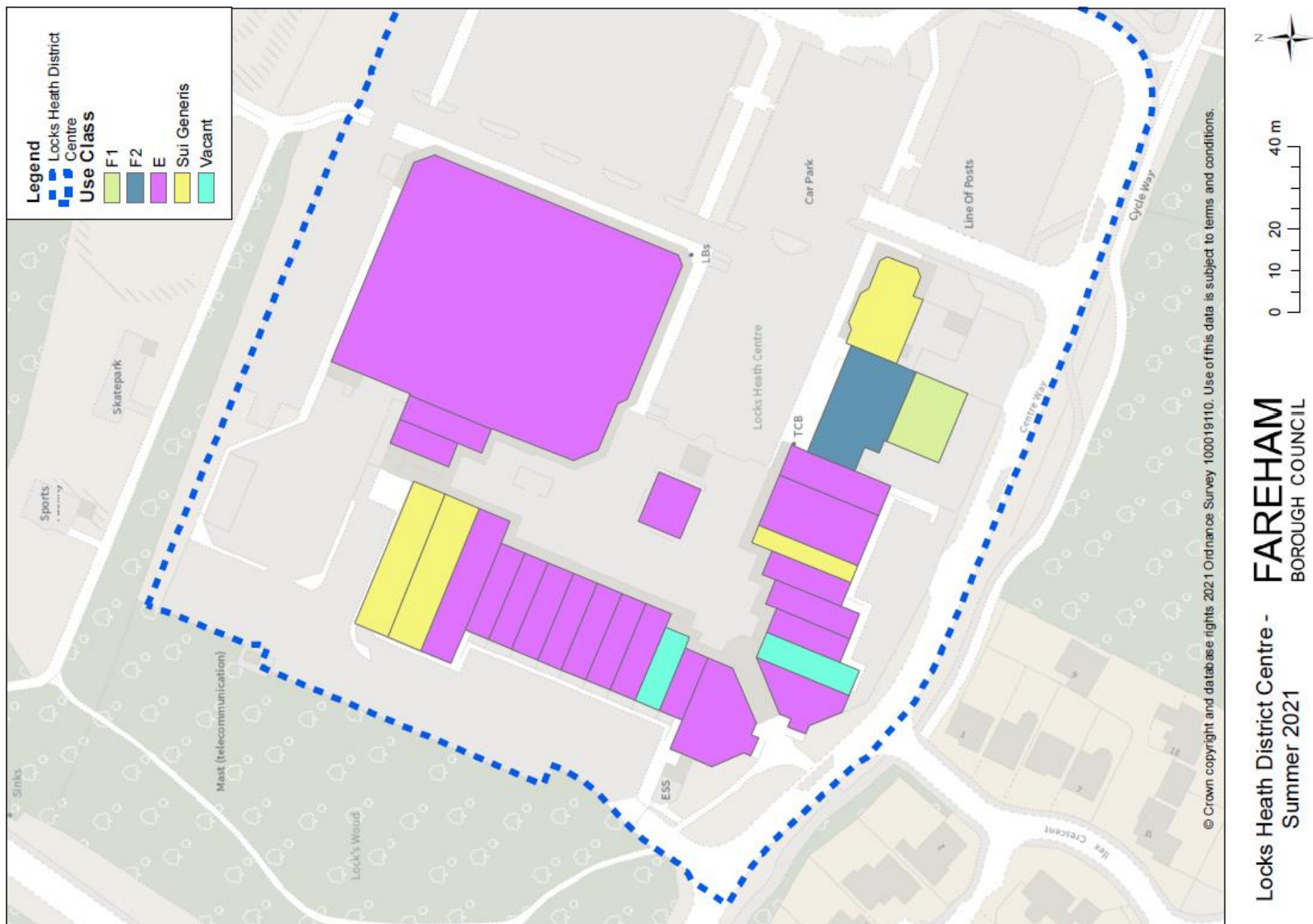


Figure 5: Locks Heath District Centre Use Classes

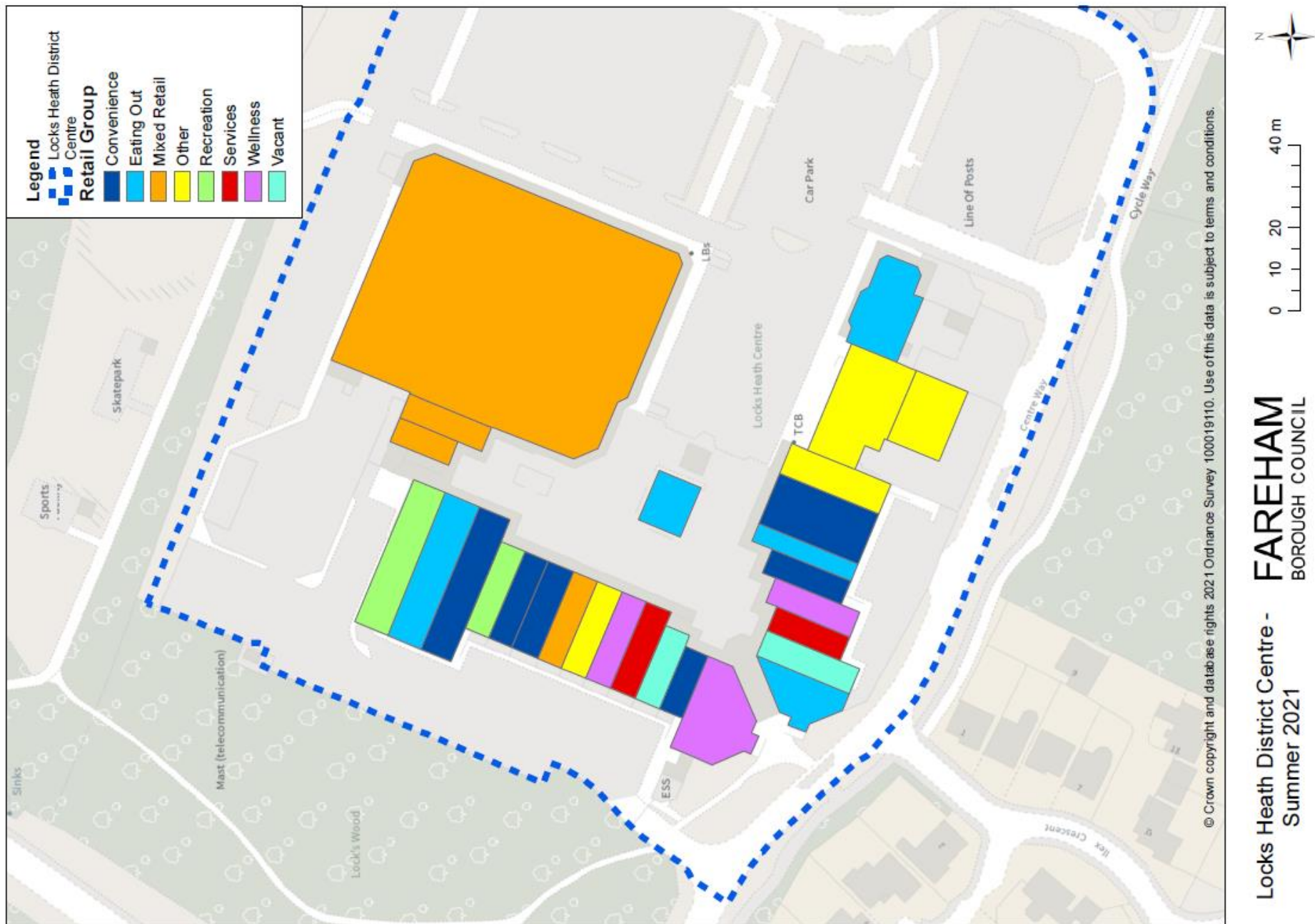


Figure 6: Locks Heath District Centre Retail Groups

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.

The occupancy rate in the centre remains consistent with 41 of the 44 units in the centre occupied, over 82% of which fall within use class E.

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

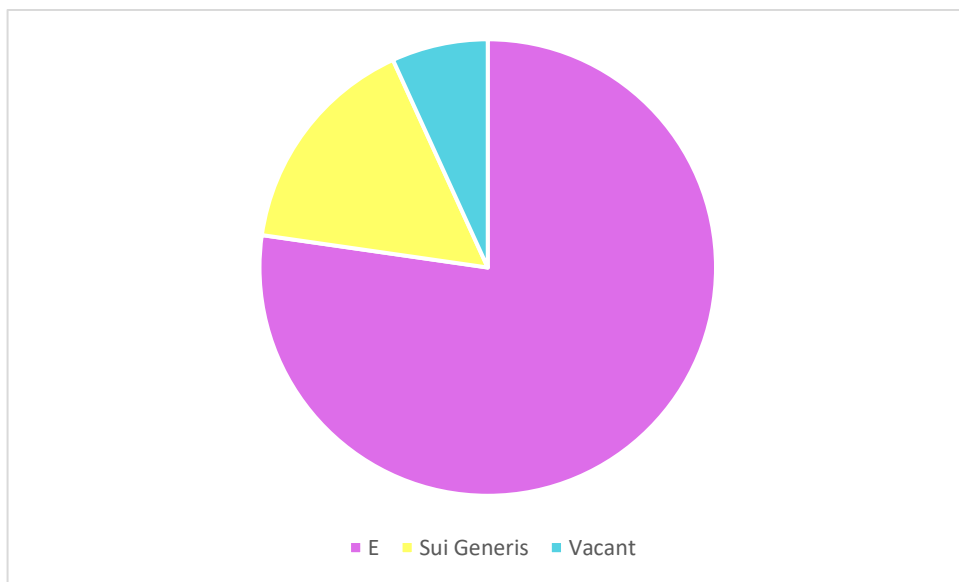


Chart 4: Stubbington Local Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	44	0		5,578
Occupied	41	0	93.1	5,338
Vacant	3	0	6.9	240
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	34		82.9	4,346
Sui Generis	7		17.1	992
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	2	0	4.9	126
Convenience	6	-1	14.6	1,558
Eating Out	7	0	17.1	977
Home & Electronics	1	0	2.4	99
Mixed Retail	7	0	17.1	1,003
Other	3	0	7.3	354
Recreation	1	0	2.4	104
Services	7	+1	17.1	434
Wellness	7	0	17.1	683

Table 8: Stubbington Local Centre Ground Floor Unit Occupancy

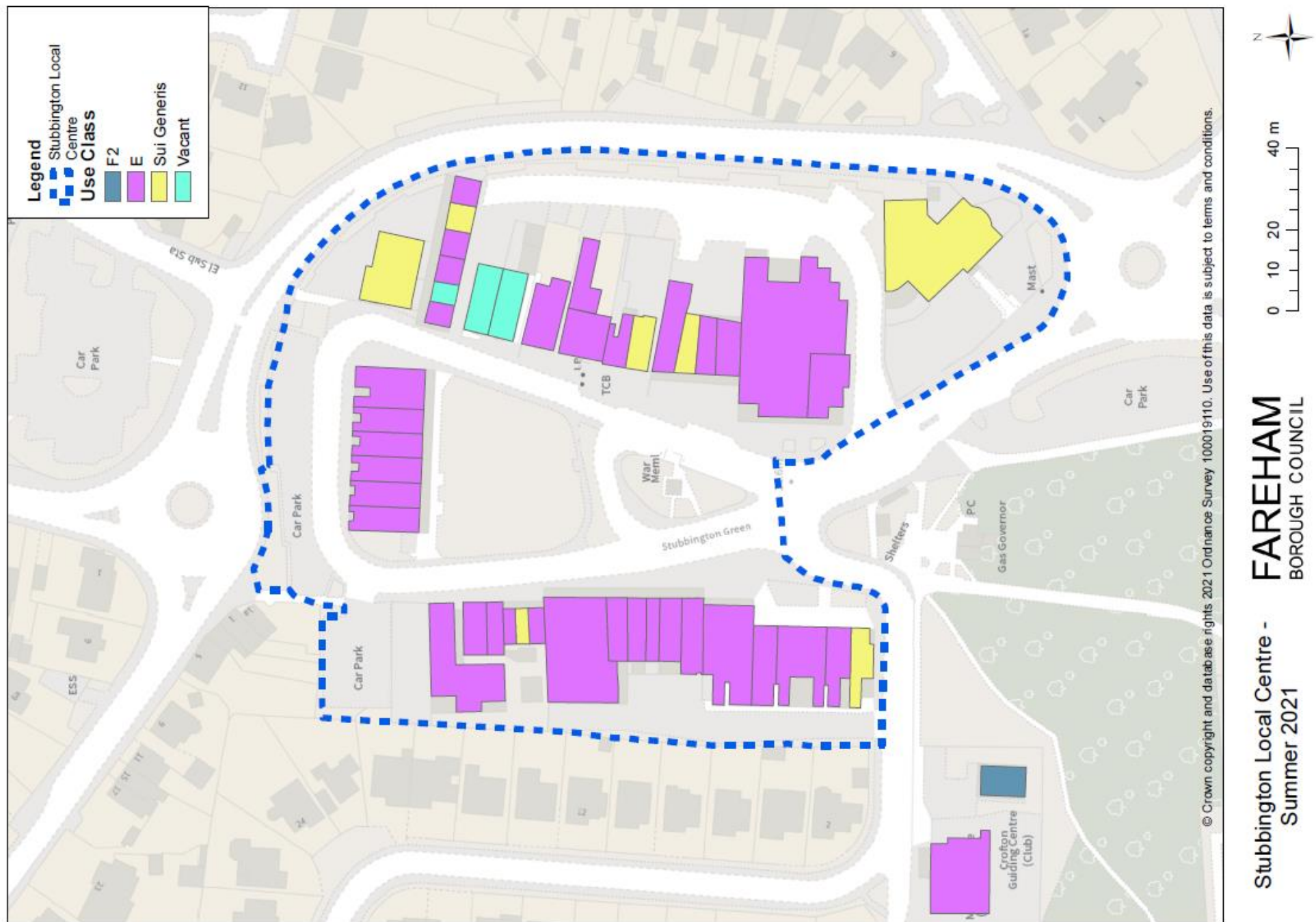


Figure 7: Stubbington Local Centre Use Classes

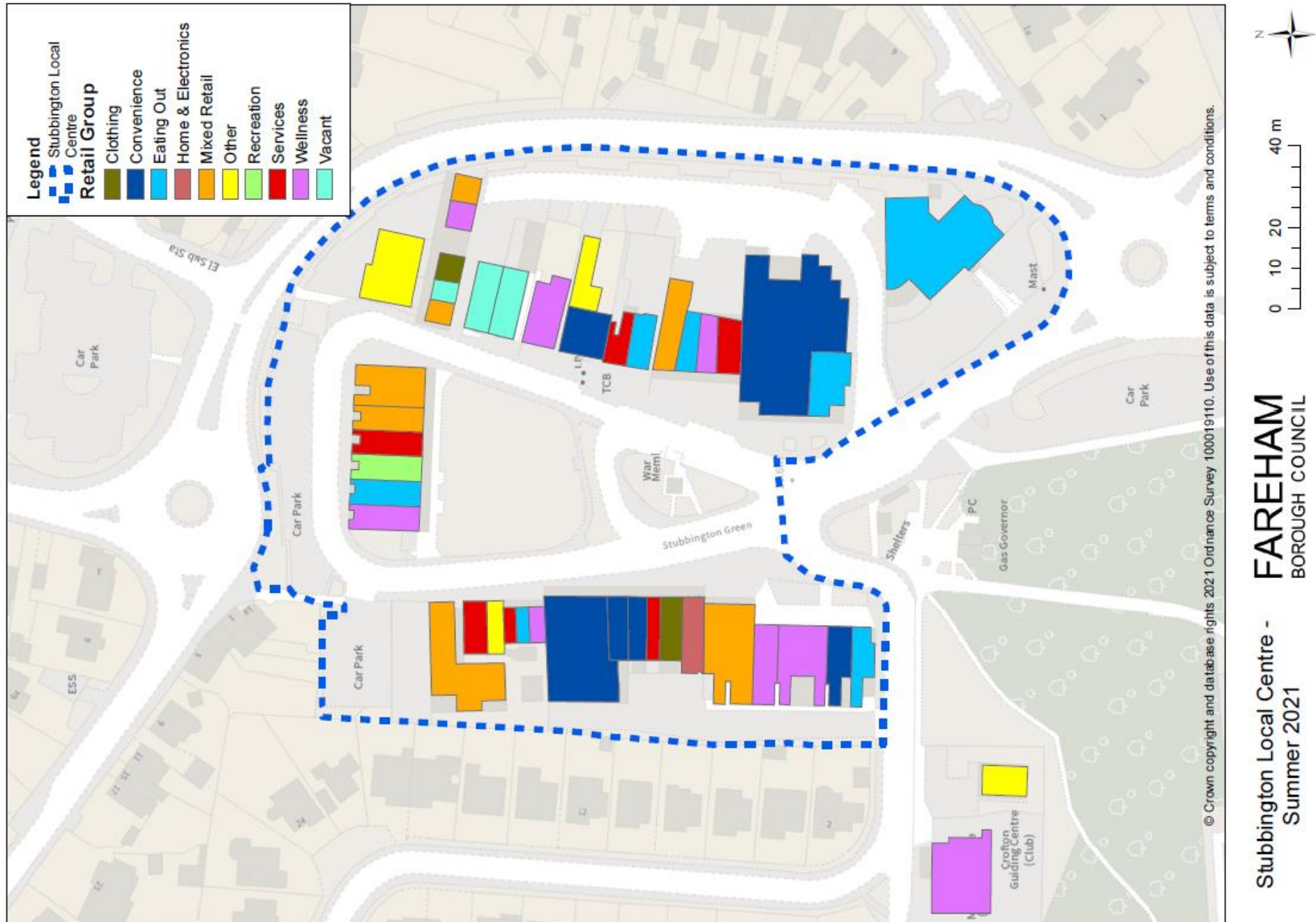


Figure 8: Stubbington Local Centre Retail Groups

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 6,879 sqm floorspace. Only a mile north of Locks Heath District Centre, Park Gate Local Centre provides a different offer. It is more orientated towards 'Services', which make up over 50% of the occupied units and 2,508 sqm floorspace.

Since the 2020 Retail Health Check a new development of apartments with retail units at street level has been completed which has resulted in an increase of 2 units within the centre, one of which has been occupied.

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.

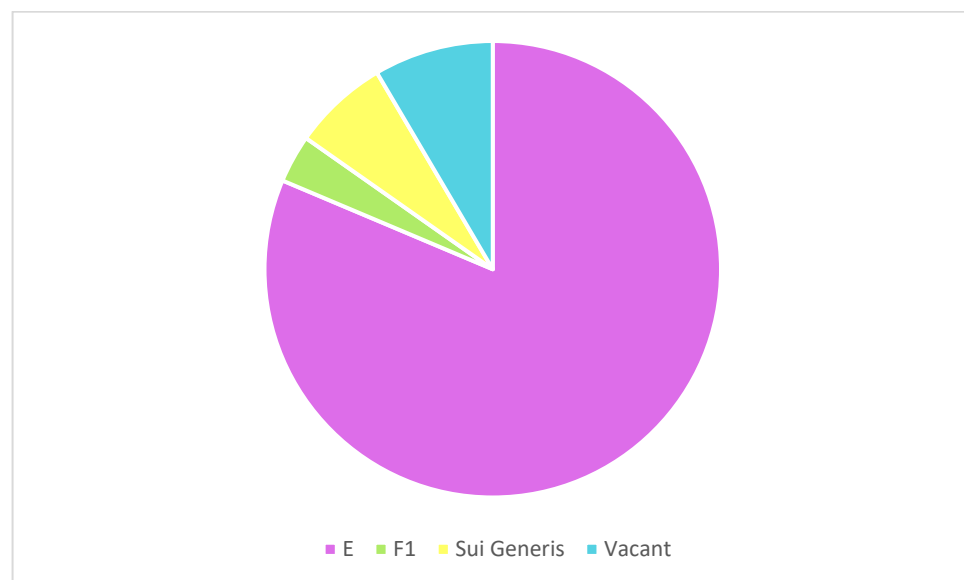


Chart 5: Park Gate Local Centre Distribution of Floorspace by Use Class

	Number of units	Change since 2020	% of total units	Floorspace (sqm)
Total	59	+2		6,809
Occupied	54	+1	91.5	6,232
Vacant	5	+1	8.5	577
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	48		88.9	5,031
F1	2		3.7	834
Sui Generis	4		7.4	367
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	1	0	1.8	27
Convenience	2	+1	3.7	310
Eating Out	4	-1	9.4	404
Home & Electronics	3	-1	7.4	260
Mixed Retail	1	0	1.8	725
Other	5	0	9.2	1,049
Recreation	2	0	3.7	130
Services	28	0	51.9	2,508
Wellness	8	+2	14.8	819

Table 9: Park Gate Local Centre Ground Floor Unit Occupancy

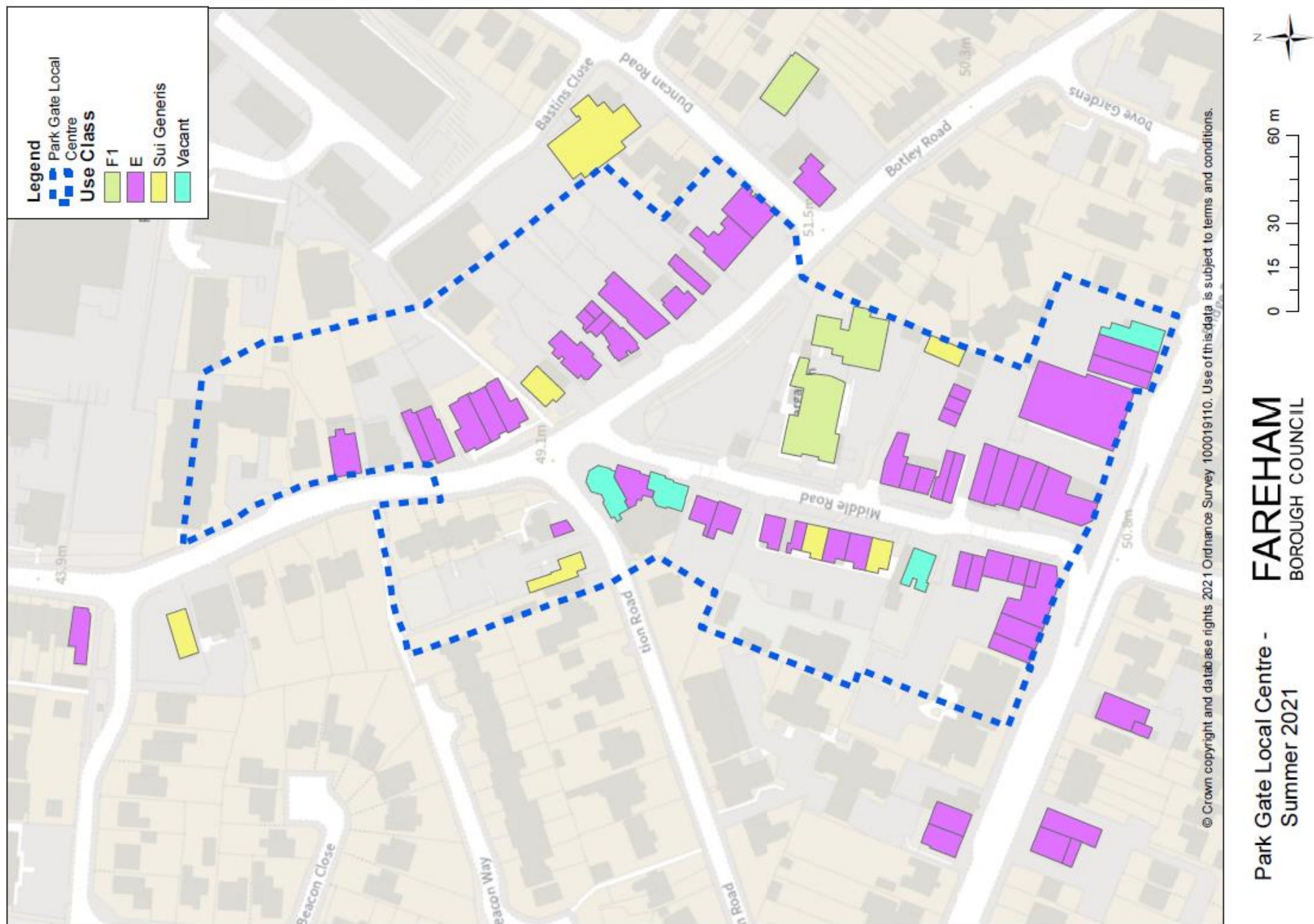


Figure 9: Park Gate Local Centre Use Classes

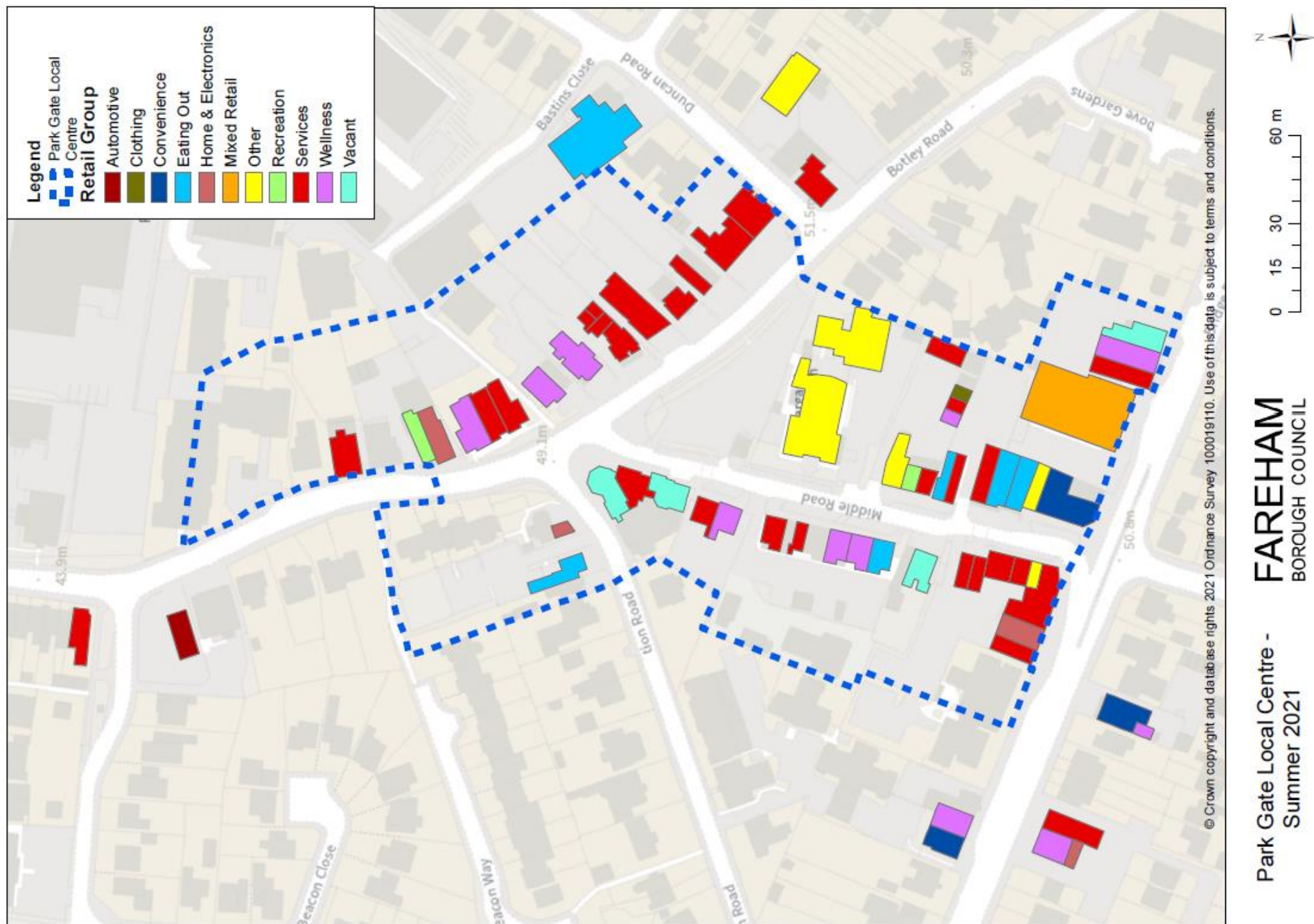


Figure 10: Park Gate Local Centre Retail Groups

Broadlaw Walk Local Centre

Broadlaw Walk is a Local Centre situated to the south-west of Fareham Town Centre, it serves local people from the surrounding residential areas. It is a small centre with just eight units. The centre's vacancy rate has remained consistent from the previous year's data.

Under the new use classes, the centre is split between class E and Sui Generis. 3 of the units are Takeaway food outlets.

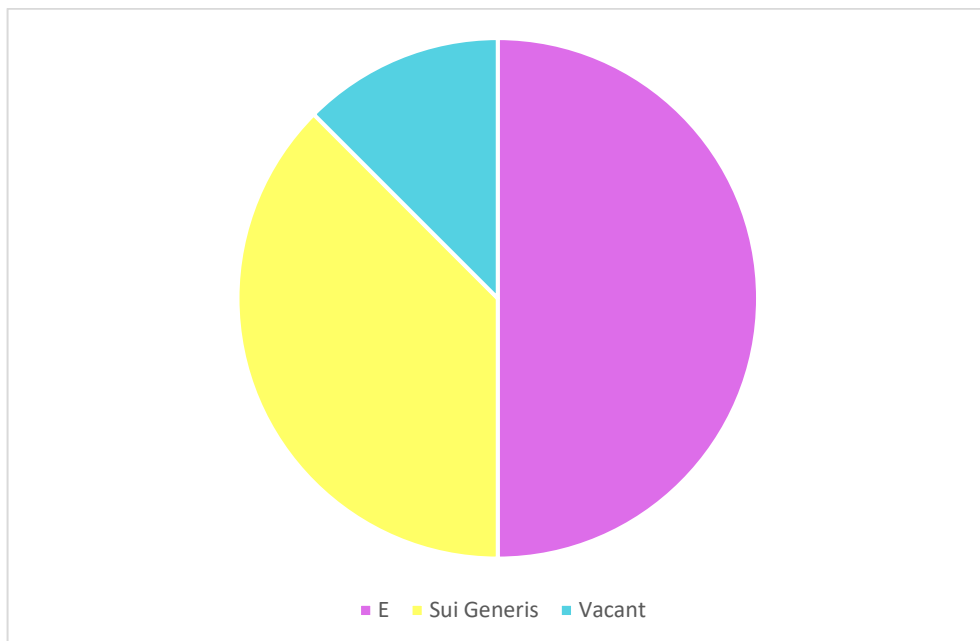


Chart 6: Broadlaw Walk Local Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	8	0		1,633
Occupied	7	0	87.5	1,541
Vacant	1	0	12.5	92
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	4		57.1	1,097
Sui Generis	3		42.9	444
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	0	0	0.0	0
Convenience	1	0	14.2	374
Eating Out	3	0	42.9	444
Home & Electronics	0	0	0.0	0
Mixed Retail	0	0	0.0	0
Other	1	-1	14.2	352
Recreation	0	0	0.0	0
Services	0	0	0.0	0
Wellness	2	0	28.7	371

Table 10: Broadlaw Walk Local Centre Ground Floor Unit Occupancy



Figure 11: Broadlaw Walk Local Centre Use Classes



Figure 12: Broadlaw Walk Local Centre Retail Groups

Highlands Road Local Centre

Highlands Road Local Centre is located to the north west of Fareham Town Centre. All 19 units and 2,543 sqm floorspace were occupied at the time of the summer 2021 health check.

The majority of units fall within the E use class, however over 35% is made up of units which fall within Sui Generis.

In terms of the retail groups, 'Eating Out' accounts for over a third of all units at 36.8% with 21% being 'wellness'.

There have been no changes in any of the units since the 2017 Retail Health Check indicating that the centre continues to be stable and successful.

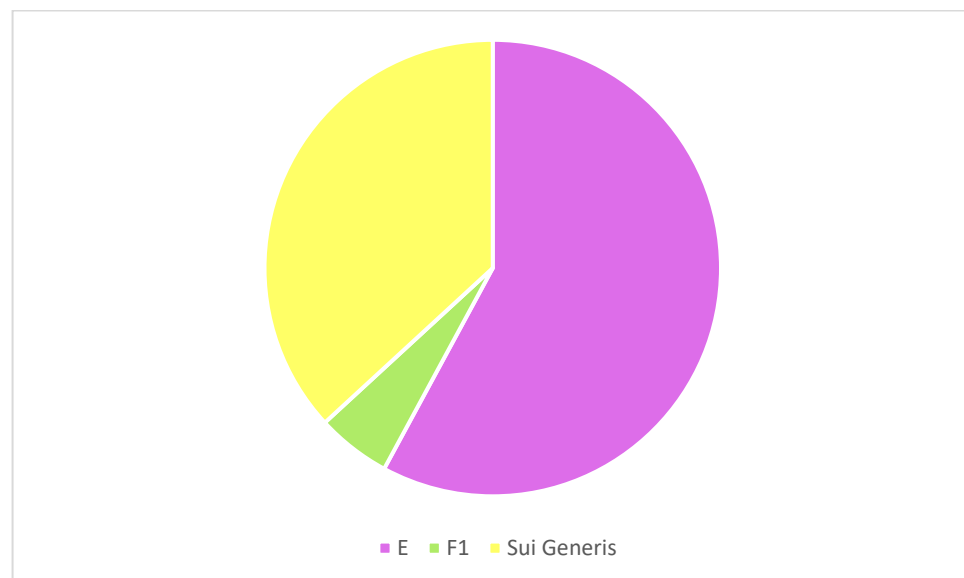


Chart 7: Highlands Road Local Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	19	0		2,543
Occupied	19	0	100	2,543
Vacant	0	0	0	0
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	11		57.9	1,867
F1	1		5.2	60
Sui Generis	7		36.9	616
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	0	0	0.0	0
Convenience	3	0	15.8	965
Eating Out	7	0	36.8	529
Home & Electronics	0	0	0.0	0
Mixed Retail	1	0	5.3	172
Other	1	0	5.3	60
Recreation	2	0	10.5	206
Services	1	0	5.3	88
Wellness	4	0	21.1	523

Table 11: Highlands Road Local Centre Ground Floor Unit Occupancy



Figure 13: Highlands Road Local Centre Use Classes



Figure 14: Highlands Road Local Centre Retail Groups

Gull Coppice Local Centre

Gull Coppice Local Centre is situated in Whiteley, in the north of the Borough. At the time of the 2021 Retail Health Check there were no vacant units.

Under the new use class, 66% of units are class E.

In terms of the retail groups, 'Wellness' is most dominant, accounting for a third of all units.

There have been no changes in retail group in any of the units since the 2017 Retail Health Check, indicating that the centre is stable and successful.

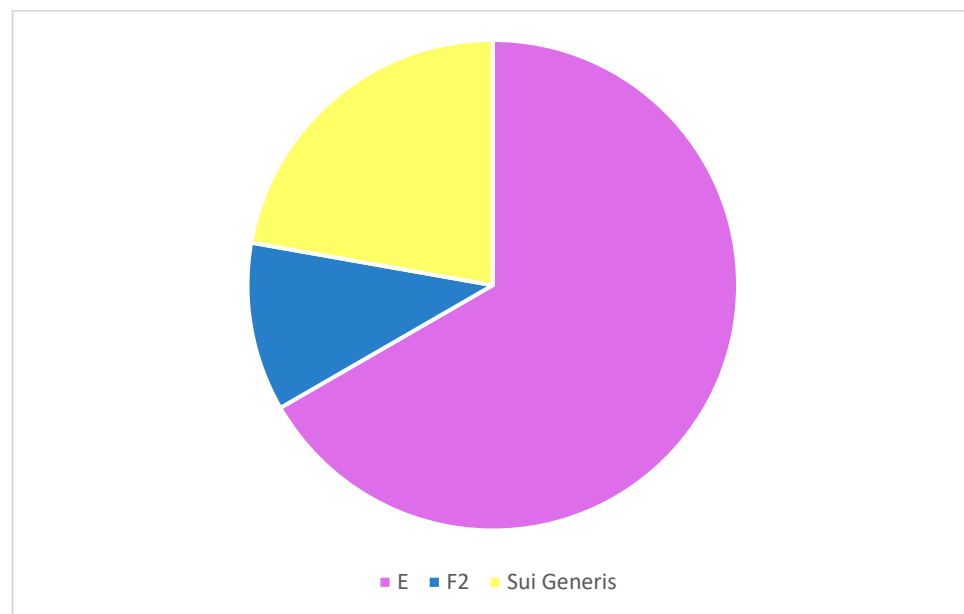


Chart 8: Gull Coppice Local Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	9	0		1,955
Occupied	9	0	100	1,955
Vacant	0	0	0	0
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	6		66.7	1,195
F2	1		11.1	561
Sui Generis	2		22.2	199
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	0	0	0.0	0
Convenience	1	0	11.1	269
Eating Out	2	0	22.2	199
Home & Electronics	0	0	0.0	0
Mixed Retail	0	0	0.0	0
Other	2	0	22.2	589
Recreation	0	0	0.0	0
Services	1	0	11.1	428
Wellness	3	0	33.3	469

Table 12: Gull Coppice Local Centre Ground Floor Unit Occupancy



Figure 15: Gull Coppice Local Centre Use Classes

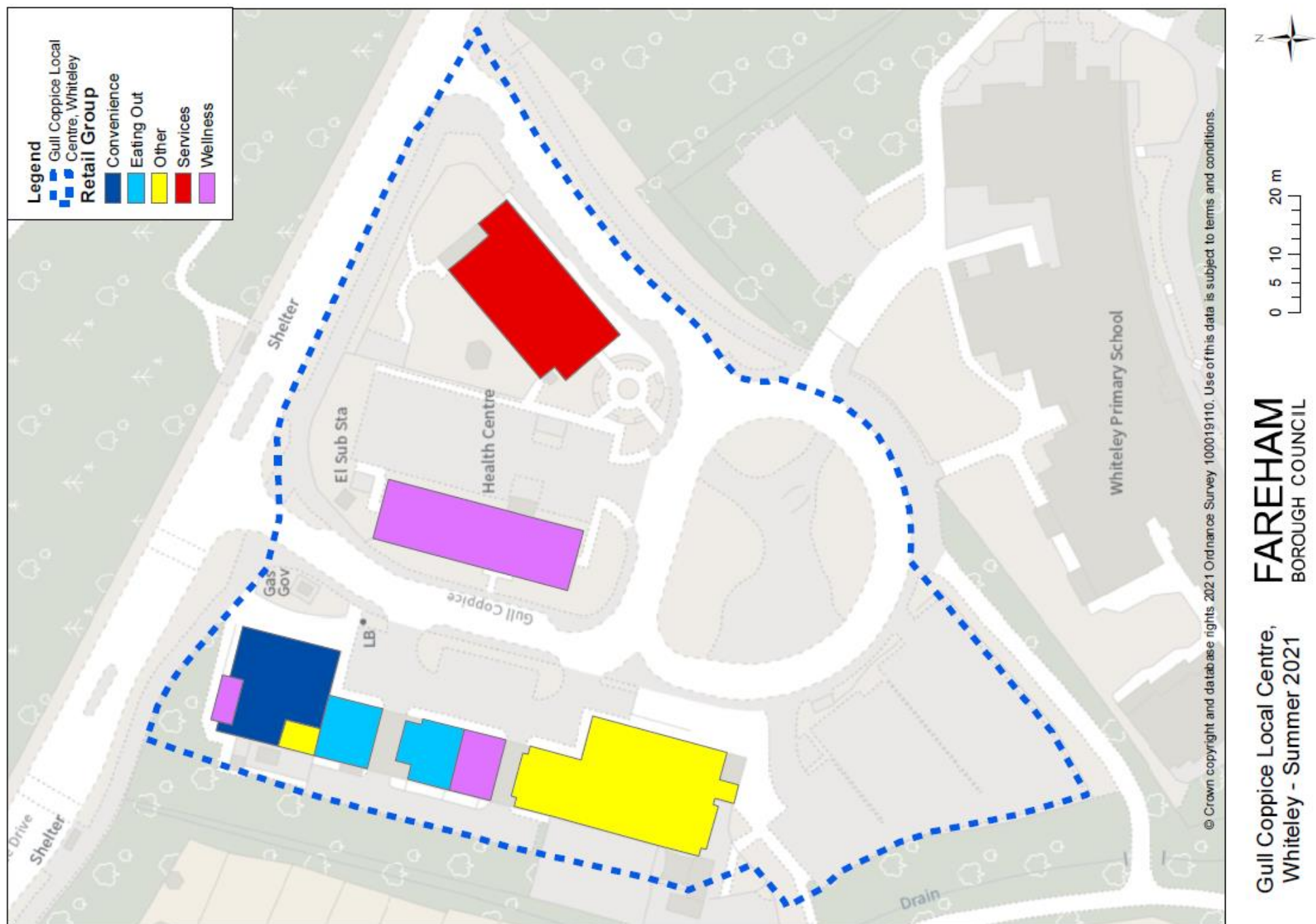


Figure 16: Gull Coppice Local Centre Retail Groups

Titchfield Local Centre

Titchfield Local Centre is located in the centre of the borough. There was 1 vacancy at the time of the summer 2020 Retail Health Check, an increase of 1 from the 2020 health check.

Most of the units in the centre fall within use class E, however 815sqm is occupied by units within Sui Generis use class. This is 36% of the total occupied floorspace and is due to the 2 largest units in the centre being pubs, which now fall within Sui Generis following the use class amendment.

In terms of the retail groups there is a good variety, 'Wellness' and 'Eating Out' account for 34% and 21% respectively of the units with 'Convenience' and 'Services' at 13% each.

The minor changes since 2020 suggest that this is a fairly stable and successful centre.

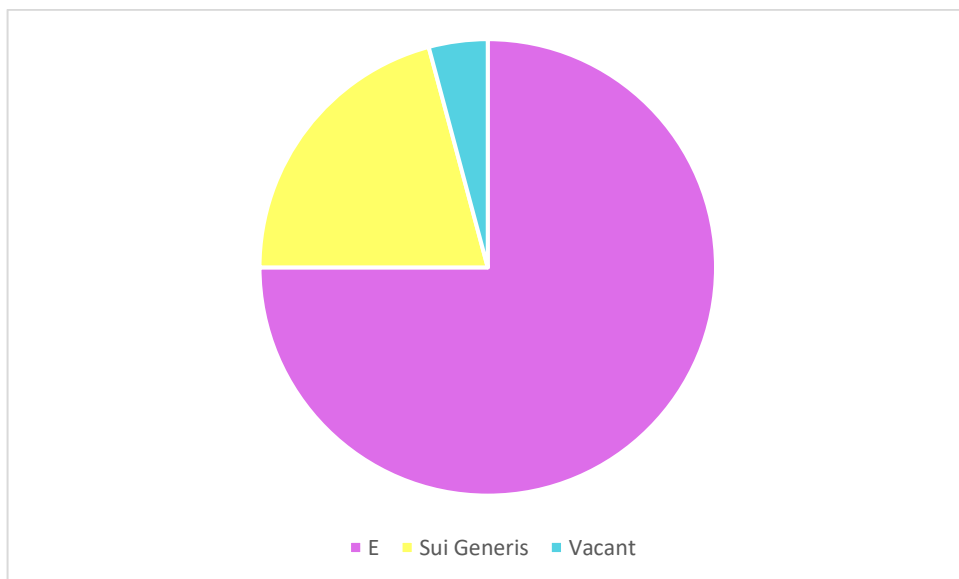


Chart 9: Titchfield Local Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	24	0		2,266
Occupied	23	-1	100	2,225
Vacant	1	+1	0	41
Use Class	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
E	18		78.3	1,411
Sui Generis	5		21.7	815
Retail Group	No. of units	Change since 2020	% occupied units	Floorspace (sqm)
Automotive	0	0	0.0	0
Clothing	2	0	8.7	84
Convenience	3	0	13.0	451
Eating Out	5	0	21.7	870
Home & Electronics	0	0	0.0	0
Mixed Retail	1	-1	4.4	41
Other	1	0	4.4	100
Recreation	0	0	0.0	0
Services	3	0	13.0	200
Wellness	8	+1	34.8	479

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 2021 Retail Health Check there were no vacant units in the Centre.

The units are split between use class E and Sui Generis with 73% of units within class E.

In terms of the retail groups the highest proportion of units are 'Wellness' (30.4%), 'Services' (21.8%) and 'Eating Out' (17.5%).

There have been no changes in the centre since 2020. This, and the lack of vacancies indicates that the centre remains stable and successful.

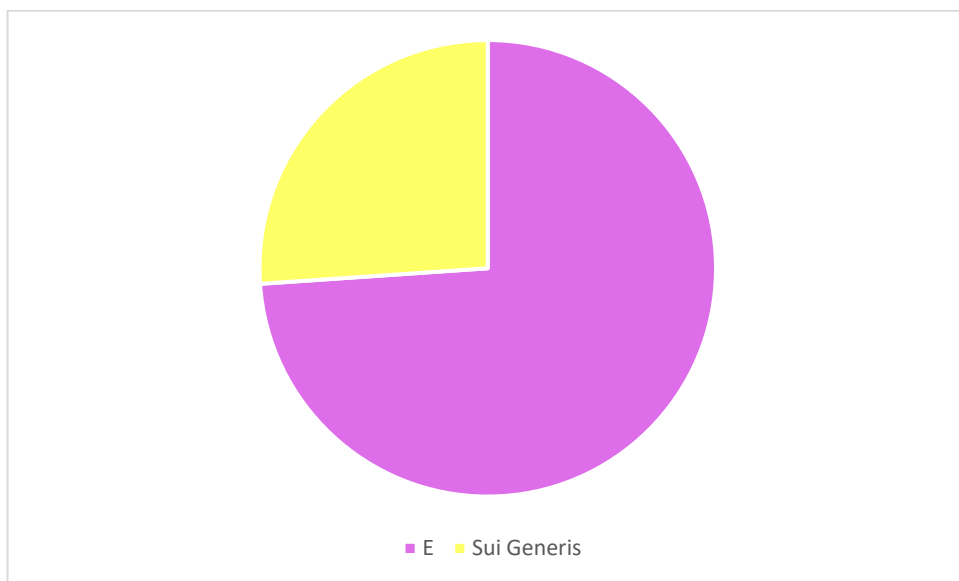


Chart 10: Warsash Local Centre Distribution of Floorspace by Use Class

	No. of units	Change since 2020	% of total units	Floorspace (sqm)
Total	23	0		3,017
Occupied	23	0	100	3,017
Vacant	0	0	0	0
Use Class	No. of units	Change since 2020	% of occupied units	Floorspace (sqm)
E1	17		73.9	1,943
Sui Generis	6		26.1	1,074
Retail Group	No. of units	Change since 2020	% of occupied units	Floorspace (sqm)
Automotive	2	0	8.7	828
Clothing	1	0	4.3	130
Convenience	2	0	8.7	411
Eating Out	4	0	17.5	331
Home & Electronics	1	0	4.3	103
Mixed Retail	0	0	0.0	0
Other	0	0	0.0	0
Recreation	1	0	4.3	83
Services	5	0	21.8	590
Wellness	7	0	30.4	541

Table 14: Warsash Local Centre Ground Floor Unit Occupancy



Figure 19: Warsash Local Centre Use Classes



Figure 20: Warsash Local Centre Retail Groups

Fareham Town Centre: Footfall Count

Method

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

The footfall surveys were conducted on Saturday 19th, Monday 21st and Wednesday 23rd June 2021, illustrating the level of pedestrian flow on Fareham's weekly market day, a regular weekday, and at the weekend. This enables analysis of these factors on footfall counts over the years. All counts were undertaken between 10am and 12 noon.

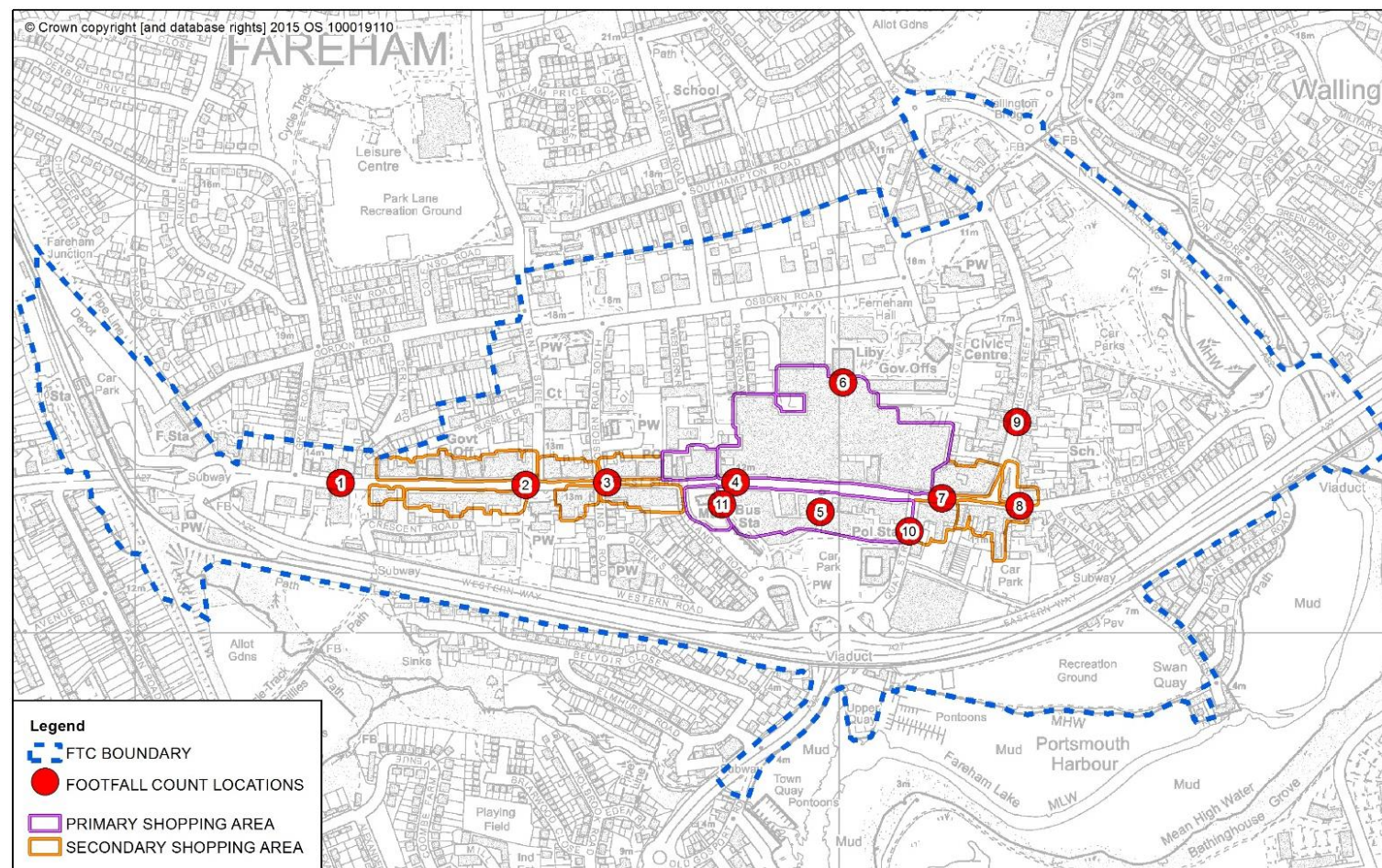


Figure 21: Footfall Count Locations - Fareham Town Centre

Analysis

This year, there has been a marginal increase shown in footfall in Fareham Town Centre since 2020. Figure 22 shows that the total footfall count has risen, however the figures are not back to the levels seen in 2019 which at that point were the lowest since monitoring began.

The total footfall count for three days was 31,834 in 2013, this decreased to 19,344 in 2019, a drop of 39.2%. In 2020 the footfall was considerably lower again at 10,068 likely due to the Covid-19 pandemic. In 2021 numbers have seen a small recovery to 15,552.

In terms of analysing daily footfall figures, Generally Saturday figures are the highest of the three days, however the Saturday count had shown a downward trend since 2013. Due to the pandemic, the footfall for Saturday in 2020 was significantly down, but the 2021 figures have seen some recovery.

Weekday figures have followed the trend seen in the Saturday figures, with a marked decline in 2020 and signs of recovery in 2021 but not to levels seen in 2016.

The change in footfall on market day since the spike in 2016 has been continuous, with a drop of 58.6% from 11,652 to 4,824 in 2020, although the market day figures did not see the steep drop in 2020. Market day figures for 2021 have declined again in 2021 to 4,188, however it should be noted that the weather for the 2021 footfall count was extremely poor, with heavy rain throughout the monitoring period which may have had a marked impact on the number of visitors during that time.

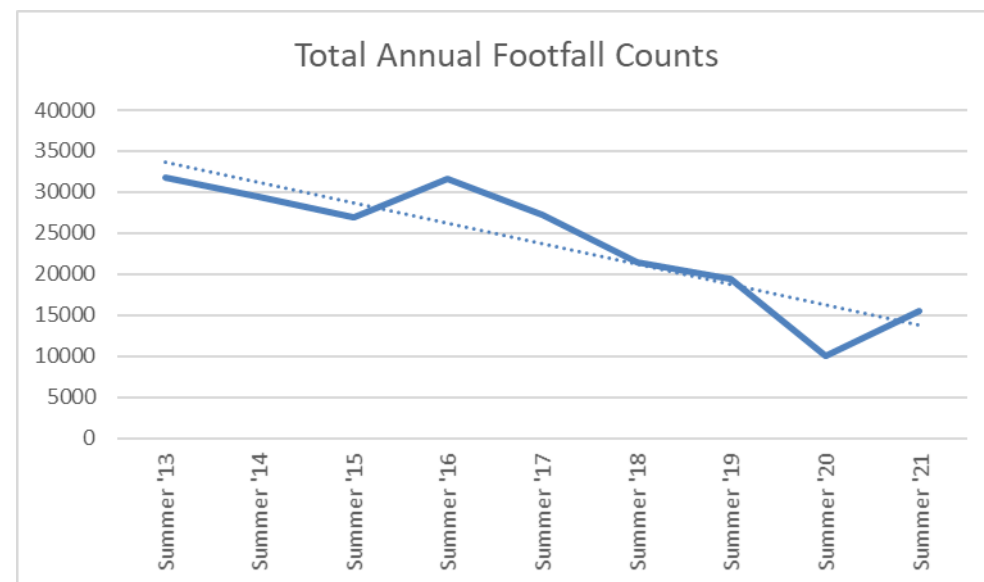


Figure 22: Fareham Town Centre Total Annual Footfall

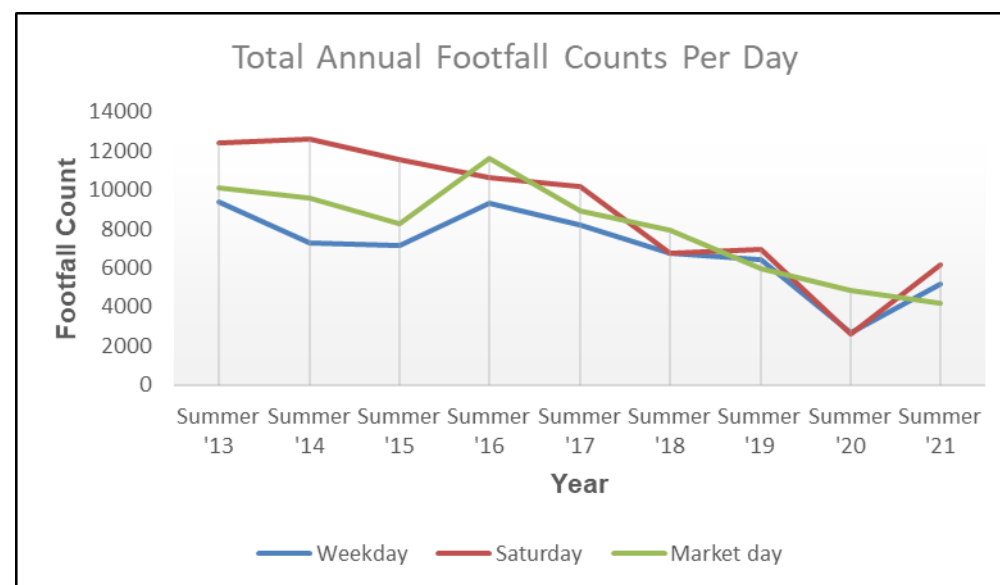


Figure 23: Fareham Town Centre Total Annual Footfall by Day

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 168	W: 84	252
2	E: 336	W: 396	732
3	E: 504	W: 240	744
4	E: 648	W: 504	1,152
5	N: 504	S: 252	756
6	N: 300	S: 540	840
7	E: 132	W: 228	360
8	E: 72	W: 144	216
9	N: 84	S: 216	300
10	N: 216	S: 252	468
11	N: 240	S: 132	372

Table 15: Fareham Town Centre Footfall count per hour: Saturday 19th June 2021

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 24	W: 36	60
2	E: 72	W: 24	96
3	E: 96	W: 108	204
4	E: 528	W: 396	924
5	N: 300	S: 204	504
6	N: 204	S: 420	624
7	E: 432	W: 408	840
8	E: 72	W: 48	120
9	N: 120	S: 60	180
10	N: 192	S: 96	288
11	N: 240	S: 108	248

Table 16: Fareham Town Centre Footfall count per hour: Monday 21st June 2021

Location	Eastwards/ Northwards	Westwards/ Southwards	Total
1	E: 48	W: 72	120
2	E: 180	W: 168	348
3	E: 312	W: 396	708
4	E: 660	W: 336	996
5	N: 300	S: 288	588
6	N: 312	S: 336	648
7	E: 144	W: 192	336
8	E: 120	W: 72	192
9	N: 216	S: 168	384
10	N: 204	S: 180	384
11	N: 29	S: 120	468

Table 17: Fareham Town Centre Footfall count per hour: Wednesday 23rd June 2021

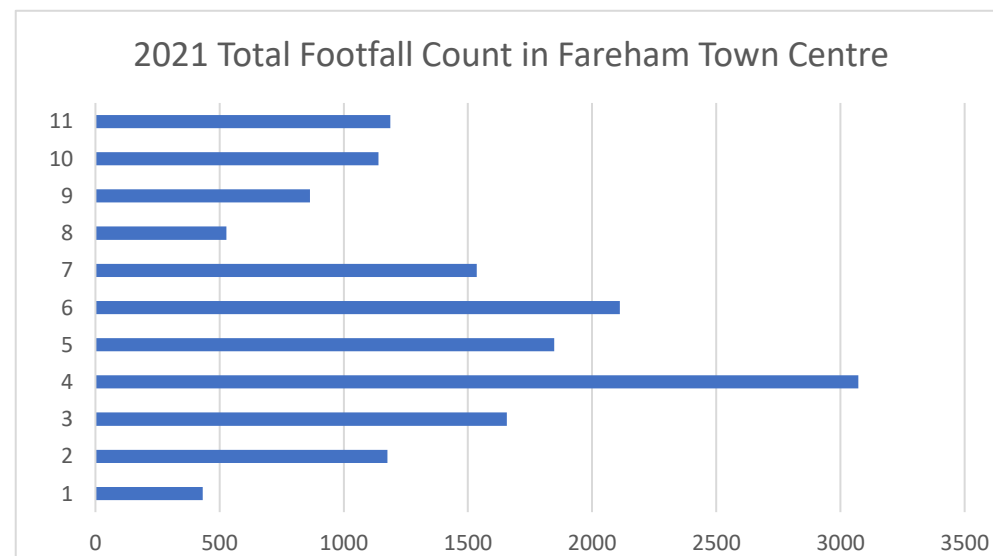


Figure 24: Fareham Town Centre Total Footfall Count at Each Location

Portchester District Centre: Footfall Count

Method

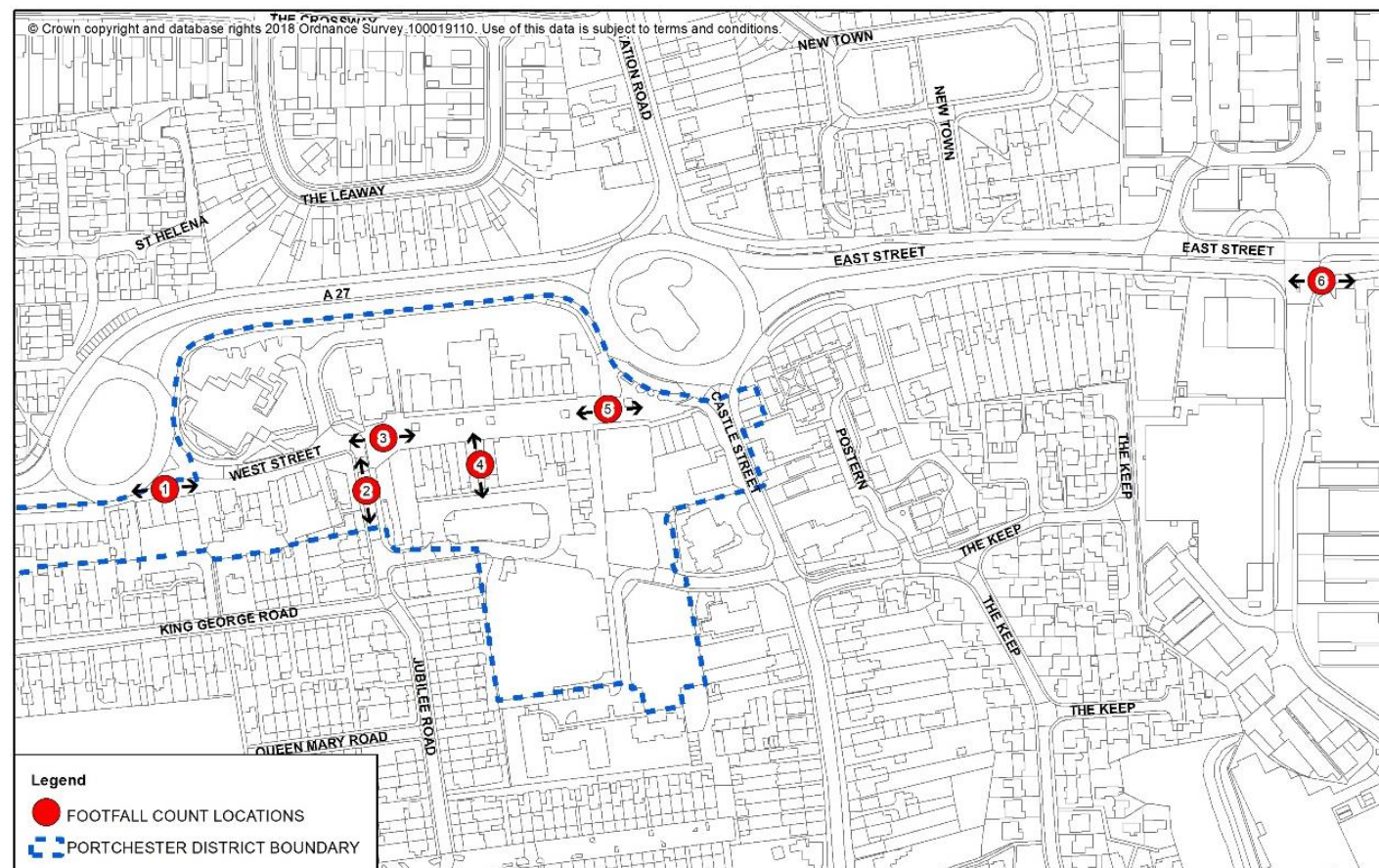
This is the fourth year that footfall surveys have been carried out in Portchester District Centre. Portchester is the second largest centre in the Borough and is identified as a regeneration area, therefore footfall data will be beneficial in gaining further insight into the retail health of the Centre. 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 Saturday 19th June, Monday 21st June and Wednesday 23rd June 2021 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 Monday and Saturday, illustrating the positive impact of the market on activity. However, in terms of overall footfall in the centre, when compared to

2019, there has been continuing decrease, despite the lessening of the Covid-19 pandemic restrictions.



Portchester District Centre Footfall Count Locations

FAREHAM
BOROUGH COUNCIL

Figure 25: Footfall Count Locations: Portchester District Centre

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 24	W: 48	72
2	N: 48	S: 24	72
3	E: 192	W: 120	312
4	N: 144	S: 72	216
5	E: 132	W: 168	300
6	E: 24	W: 60	84

Table 18: Portchester District Centre Footfall count per hour: Saturday 19th June 2021

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 36	W: 12	48
2	N: 132	S: 24	156
3	E: 96	W: 108	204
4	N: 60	S: 84	144
5	E: 144	W: 120	264
6	E: 24	W: 12	48

Table 19: Portchester District Centre Footfall count per hour: Monday 21st June 2021

Location	Eastwards / Northwards	Southwards / Westwards	Total
1	E: 36	W: 36	72
2	N: 0	S: 12	12
3	E: 312	W: 252	564
4	N: 180	S: 132	312
5	E: 240	W: 132	372
6	E: 0	W: 24	24

Table 20: Portchester District Centre Footfall count per hour: Wednesday 23rd June 2021

The footfall count in Portchester for 2021 is the lowest seen to date. The count has only been undertaken for four years in Portchester and therefore there is not yet longevity to the data. However, this will

provide a clearer picture of the retail health in Portchester District Centre moving forwards.

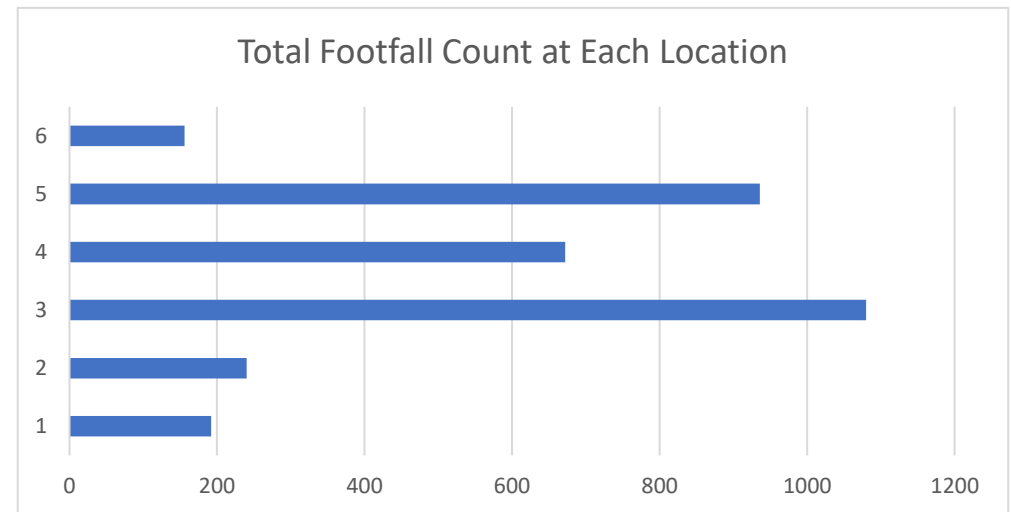


Figure 26: Portchester District Centre Total Footfall Count at Each Location

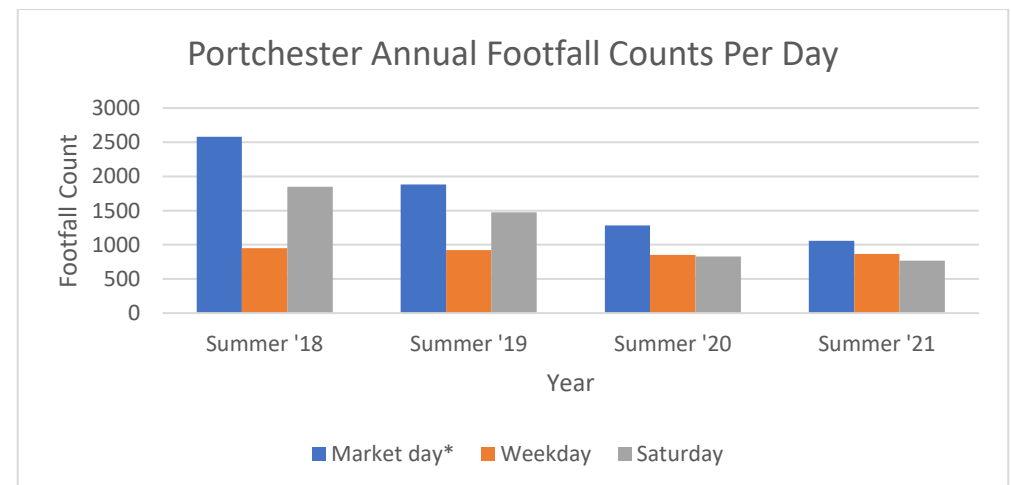


Figure 27: Portchester District Centre Total Footfall Count by Day