Fareham Local Development Framework

Shaping Fareham's Future

Retail Health Checks Summary Paper

Autumn 2013

FAREHAM
Local
Development
Framework

FAREHAM
BOROUGH COUNCIL

Contents

Further Information and Contacts

Information on the general Local Development Framework process, updates on the progress of Fareham's Local Development Documents and current consultations, are available at the following website: www.fareham.gov.uk/ldf.

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For more detailed information and guidance on the planning system, visit the Department for Communities and Local Government website at http://www.communities.gov.uk.

1. Introduction

Retail Health Checks (RHC), as a tool for assessing the vitality and viability of town centres, were first introduced in Planning Policy Statement 6: Planning for Town Centres (2005) (subsequently replaced by PPS4 and by the NPPF) as a response to the growing importance of out-of-town retail centres, the decline of town centres and “the loss of specifically urban ways of life”.

The main function of a RHC is to monitor the vitality and viability of a town centre. Vitality refers to how busy an urban centre is at different times and locations and viability relates to the continuing ability of that centre to attract investment. RHC monitors change over time, helps to predict future trends and prevent negative developments. It also allows local authorities and other organisations to measure the effectiveness of their own town centre initiatives as well as impact of competitive centres, such as nearby out of town shopping centres.

At the local level, a RHC forms an important part of evidence base for local authority strategic development plans. Furthermore, a RHC is often used in making development management decisions and in the town centre management. Finally, robust and up to date data can be useful in bidding for funding for regeneration and improvement projects.

In Fareham Borough Council, the Retail Health Check was first undertaken in 2009. Since then, every year a check is made for the whole Borough (including town centre, district centres and local centres) and twice a year for Fareham Town Centre only.

The content of the report varies each year, depending on the current needs. Some data is more useful when collected frequently; some can be collected annually or biannually. The table below shows the most used indicators, their timescale and the method of collecting data.

Criterion	Timescale	Method of Data Collection
Diversity of main town centre uses (by number, type and amount of floorspace)	Annually (September) expect for Fareham TC (6 monthly)	Review of units in town centre by observation. GIS used to calculate total floorspace.
The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations	Annually (March)	Review by observation. GIS used to calculate total floorspace.

The potential capacity for growth or change of centres in the network	Long-term	Reliant on updates to evidence studies and DPD's
Retailer representation and intentions to change representation	Long-term	Reliant on updates to evidence studies and DPD's
Proportion of vacant street level property	6 Monthly (September & March)	Review by observation
Pedestrian Flows	6 Monthly (September & March)	Review by observation
Accessibility	Annually (March)	Residents questionnaire
Customer and residents' views and behaviour	Annually (March)	Residents questionnaire
Perception of safety and occurrence of crime	Annually (March)	Residents questionnaire
State of the town centre environmental quality	Annually (March)	Residents questionnaire

The information contained in the RHC forms a part of evidence base, for example, for Fareham's Core Strategy, Local Plan Part 2: Development Sites & Policies and the Authority Monitoring Report. Furthermore, this information, and in particular data on vacant units and vacancy rates in the centres, is a material consideration in development management decision making process.

The report is published on the Fareham Borough Council website at: http://www.fareham.gov.uk/planning/local_plan/economicdev.aspx and a GIS layer, including information on commercial units, is added onto the Fareham GIS Map also available online at https://maps.fareham.gov.uk/LocalViewWeb_External/Sites/in%20my%20area/# .

Finally, the results of the RHC, together with other reports, prepared by independent consultants, can provide evidence for strategic planning and future actions, such as changes to the car parking charges, improvements of vacant unit facades or even a regeneration of a whole Locks Heath district centre.

1.1 National Planning Policy Context:

Planning Policy Statement 6: Planning for Town Centres (2005) and Planning Policy 4: Planning for Sustainable Economic Growth (2004)

The idea of producing Retail Health Checks (RHC) was first introduced in PPS6 as one of many tools to assist with the assessment of planning policies performance against defined core output indicators in the process of an Annual Monitoring Report. The indicators relevant to Town Centre performance and used in RHC process were: the amount of completed retail, office and leisure development and the percentage of completed office, retail and leisure development in town centres. Further, PPS6 also recommended that the network and hierarchy of centres (such as town/district/local centres), the need for further development and the vitality and viability of centres (at the local level) should be identified and monitored. The last requirement was the basis for the introduction of RHC process in the local planning authority's procedure. This was reiterated in the later PPS4. Here, the specific purpose of and requirement for the RHC was defined as:

"To measure the vitality and viability and monitor the health of their town centres over time and inform judgements about the impact of policies and development, local authorities should also regularly collect market information and economic data, preferably in co-operation with the private sector, on the key indicators (…)"

The first list of key performance indicators (KPIs) were provided in PP6 and then expanded in PPS4.

National Planning Policy Framework (NPPF, 2012):

The NPPF, which superseded both PPS4 and PPS6, does not alter the government position towards the importance and process of RHC. It still requires local planning authorities to plan positively for town centre growth and expansion, and stresses that this requires adequate evidence base, such as the understanding of "the role and function of town centres and the relationship between them, including any trends in the performance of the centres".

Planning for Town Centres: Practice guidance on need, impact and the sequential approach (2009)

This practice guidance explains the importance of understanding long term trends to provide "robust policies", which improve investor confidence and certainty in complex/large scale Town Centre development and regeneration schemes. The guidance stressed that regular assessments of Town Centre performance over time, in relation to national trends and to similar centres elsewhere can indicate whether the centre is "improving, stable or declining" and how resilient it is to a change. This information can in turn help to make long term decisions i.e. on the extent of primary and secondary shopping areas, if the role and functions of different parts of centre have changed over time, the need for new development but also to understand the impact of new development somewhere else (i.e. a new shopping centre in a neighbouring district).

Department for Business, Innovation & Skills (BIS): Understanding High Street Performance (2009)

BIS guidance also recognises the importance of collecting evidence to assess the performance of the high street, especially during economic recession and changes in consumer behaviour (online shopping etc.). It stresses that the modern High Street should not only encompass retail function but also leisure, entertainment and other functions. The guidance suggested only four key performance indicators, which could be customised in accordance with local circumstances. These are footfall, consumer and business satisfaction, diversity and economic activity. These indicators should allow "local authorities and their partners to judge whether a high street is succeeding, failing, stable or in transition, and have a better understanding of why this is the case".

Similarly to previous guidance, BIS also claims that by using KPIs assessment in conjunction with information on other competing centres, local authorities can "develop understanding of the relative roles, strengths and weaknesses, and impacts on each other".

<u>Urban and Economic Development Group (URBED, 1994): Vital and Viable Town Centres: Meeting the Challenge</u>
URBED recommends an alternative approach to measure the vitality and viability which is based on three qualities, which are to be assessed by Town Centre managers, planning officers or external consultants. These are: attractions, accessibility and amenity. Attractions include Town Centre features which attract customers, such as variety of shops and services, art, culture and entertainment provision as well as business space and residential accommodation. Accessibility includes availability of variety of quality transport options, to the centre and within it. Amenity is the environment and the identity of the town centre, including appearance of public spaces, public and private buildings and perception of safety. URBED suggests that these assessments should include comparison with neighbouring centres.

1.2. Retail Health Check Toolkit: Key Performance Indicators (KPIs):

The measurement of vitality and viability of town centres involve a number of indicators. The range of indicators is extensive and various approaches to RHCs are proposed by the literature and government guidance (as explained above). However, it is local authority that decides which indicators will be used. The table below lists the most often suggested KPIs, their function and other details.

Key Performance Indicator	Definition/function	Suggested by
Diversity of main town centre uses	the amount of space in use for different uses such as offices; shopping; leisure, cafes and hotels	PPS6 PPS4 BIS
Amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations		PPS6 PPS4

Potential capacity for growth or change of centres in the network	opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of development	PPS6 PPS4
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	PPS6 PPS4
Shopping rents	pattern of movement in rents within primary shopping areas (i.e. the rental value for the first 6 metres depth of floorspace in retail units from the shop window)	PPS6 PPS4
Proportion of vacant street level property	Including primary and secondary frontage	PPS6 PPS4
Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental)	demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments	PPS6 PPS4
Pedestrian flows (footfall)	a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets,	PPS6 PPS4 BIS
Accessibility	ease and convenience of access by a choice of means of travel, 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	PPS6 PPS4
Customer and residents' views and behaviour	regular surveys to help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities	PPS6 PPS4 BIS

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	PPS6 PPS4
State of the town centre environmental quality	includes information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces)	PPS6 PPS4
Land values and the length of time key sites have remained undeveloped	provides important indicators for how flexible policies should be framed and can help inform planning decisions	PPS4
Economic activity	shows the success of the high street as a commercial entity, measured by consumer spend, non-retail business turnover, business sectors represented and new investment and development activity tec.	BIS

In order for us to fully understand the state of the town centre it is necessary to maintain a level of understanding of the above criteria. Whilst some of the criteria are continually evolving, for example proportion of vacant street level property, others may stay stable for longer periods of time, for example retailer representation or the potential capacity for growth and change in centres. For this reason, it is not appropriate to review each criterion over the same timescale. Table 1 shows the proposed timescale for reviewing each criterion, and how information will be gathered.

Criterion	Timescale	Method of Data Collection
Diversity of main town centre uses (by number, type and amount of floorspace)	**Annually (September) expect for Fareham TC (6 monthly)**	**Review of units in town centre by observation. GIS used to calculate total floorspace**
The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations	**Annually (March)**	**Review by observation. GIS used to calculate total floorspace.**
The potential capacity for growth or change of centres in the network	**Long-term**	**Reliant on updates to evidence studies and DPD's**
Retailer representation and intentions to change representation	**Long-term**	**Reliant on updates to evidence studies and DPD's**
Proportion of vacant street level property	**Annually (September) expect for Fareham TC (6 monthly)**	**Review by observation**

Pedestrian Flows	**6 Monthly (September & March)**	**Review by observation**
Accessibility	**Annually (March)**	**Residents questionnaire**
Customer and residents' views and behaviour	**Annually (March)**	**Residents questionnaire**
Perception of safety and occurrence of crime	**Annually (March)**	**Residents questionnaire**
State of the town centre environmental quality	**Annually (March)**	**Residents questionnaire**

2. Updates since Summer 2013 Paper

This summary paper provides a limited but important update to the health of Fareham Town Centre. Regular updates are important to maintain the continuity of the datasets and the validity of analysis and conclusions.

The Speciality Shopping Area as referred to in previous Health Checks has been incorporated into the Secondary Shopping Area.

Diversity of uses in Fareham Town Centre and vacancy rates have been analysed and their records updated.

The findings are presented in **Chapter 3** and **Chapter 4** and detailed information is included in subsequent **Appendices** which are located at the end of this document. This chapter also shows how these vacancy rates are changing over time compared to previous summary papers and the national average.

Finally, new pedestrian footfall counts have been recorded in **Chapter 6**. These show the movement of pedestrians throughout Fareham Town Centre on different days of the week, and how this has changed over time.

Amount of retail, leisure & office floorspace in "out of Town" and "edge of centre" locations is included in **Chapter 7**, although this has not changed significantly since last retail checks.

3. Diversity of Uses

The diversity of town centre uses is assessed based on observation. This provides us with data for the use of each unit, from which we can ascertain the split of use classes within the Primary and Secondary Shopping Areas.

A basic definition of the use classes frequently referred to in this document are:

- A1 - Shops for retail sale or the display of goods (other than hot food), Sandwich shops, hairdressers, funeral directors, travel and ticket agencies, post offices, hire shop for domestic or personal goods, showrooms, pet shops and internet cafes.
- A2 - Financial or professional services (other than health/medical services) or any services including betting office.
- A3 - Restaurant and Cafes. Sale of food and drink for consumption ON the premises.
- A4 - Pubs, bars or other drinking establishments.
- A5 - Takeaways. Sale of hot food for consumption OFF the premises
- B1 - Business. Office (other than an A2 use), research and development of products and processes, studios, laboratories, high tech, any light industry.
- B2 - General Industry. Industry other than that falling within B1.
- C1 - Hotel, boarding or guest house where no significant element of care is provided.
- C2 - Residential accommodation and care to people in need of care, hospital nursing home or residential school.
- D1 - The provision of health services, crèche, day nursery/centre, for providing education, place of worship, public exhibition hall, museum, library and art galleries.
- D2 - A cinema, concert hall, bingo hall/casino, swimming pool, dance hall, skating rink, gym or other area for indoor or outdoor sports/recreation.
- Sui-generis - Uses that do not easily fall into any of the use class listed above, such as car showrooms/repair facilities, nail bars etc.

Floorspace calculations were taken as the total floorspace of each unit as calculated by GIS mapping. Whilst this does not take account of differences between total and sales floorspace figures it does provide general figures which can be used.

As well as looking at the use class, each unit was also classified dependent on the type of occupier. The categories for the different types of occupier were:

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

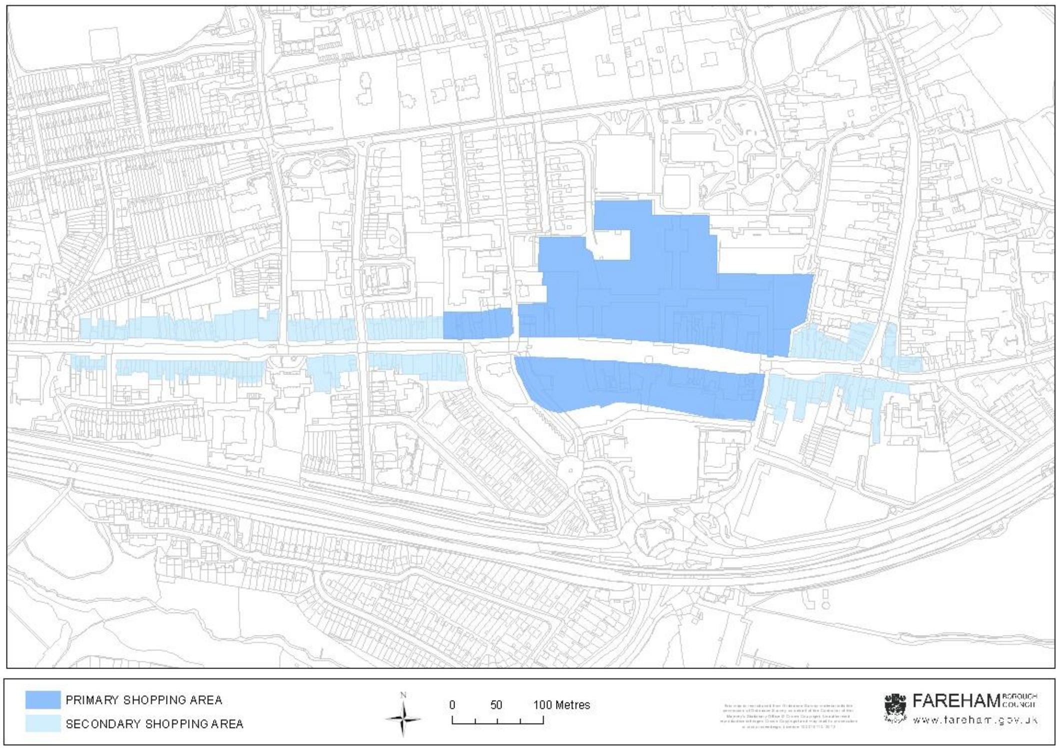
- Services (inc. banks, estate agents, hotels)
- Wellness (inc. dentists, hairdressers, opticians)

This gives us a fair impression of the types of units that are currently within the centre, with an ideal position being that each category is represented, with no particular category dominating.

3.1 Fareham Town Centre

Fareham Town Centre is undoubtedly the Borough's largest and most diverse shopping destination. It serves not only the Borough, but a wider catchment area including parts of Gosport and Winchester. Within the Town Centre there were 387 units recorded, of which 37 (9.56%) are currently vacant. The number of units in Fareham has decreased by 11 since the last health check. Some units were converted to residential (7 units), some new units came into existence as offices within first floor space and others were "lost" as a result of the expansion of existing shops.

The Town Centre is divided into Primary and Secondary Shopping Areas, the boundaries of which are shown below. It is important to control the mix of uses in these locations, especially the Primary Shopping Area as they act as the heart of the Centre and are the main draw for shoppers and other visitors. Rising vacancy rates or an inappropriate mix of uses can deter visitors and potentially harm the long term viability of the Town Centre.



Currently 59.03% of all the units in the **Primary Shopping Area** are retail shops (A1). These units account for nearly 70% of the total floorspace. The majority of the larger units are in A1 use, such as BHS, M&S, Wilkinson, Boots, Next and New

Look. Other than a number of small cafes, the indoor Shopping Centre is almost entirely made up of A1 shops, with the pedestrianized area of West Street offering a more varied mix of uses including a concentration of banks and building societies in the central area. Recently there has been an increase in the number of charity shops within the shopping centre. This has been as a result of some shops closing or moving to the secondary shopping area where rental rates are cheaper and the subsidy that charity shops receive.

In terms of types of occupiers, the number of mixed retail stores (including department stores, charity shops, and supermarkets) has remained unchanged at 23 and make up 15.97% of all units. The number of clothing stores has also remained unchanged since the summer survey, it is still one of the most represented occupier types in the Primary Shopping Area, making up 14.58% of all units. Services, Wellness and Eating out have similar representation of uses individually representing 12.50%, 13.19% and 11.11% of uses and collectively 36.80% of all units. Convenience shops, Home & Electronics and Recreation are less represented. Similar to the previous monitoring period, the only group which does not exist within Primary Shopping Area is Automotive.

Nearly half of the units in the **Secondary Shopping Area** are A1 shops (44.67%), although this includes a high proportion of A2 (19.33%) service type units with a concentration of estate agents on the eastern end of West Street. The number of A1 units has risen by 1 since the last health check and by 6% in terms of floorspace. One of the most significant changes related to retailer representation within this area is the recent closing down of the only fishmonger in Fareham, P&S Cripps, which has traded in the Centre for almost 100 years.

It also accommodates a significant number of smaller/independent retailers and start-up businesses and therefore experiences rapid turnover of occupiers and high level of temporary vacancies. The Council welcomes a variety of businesses in this area by being flexible and less strict when considering planning applications for a change of use. Recently, there were several applications granted for new cafes/restaurant uses that are expected to attract more customers to this part of Fareham Town Centre, enhancing its vibrancy.

The mix of occupier types in the Town Centre is generally difficult to control. However, maintaining a good supply of A1 shops, especially in the Primary Shopping Area, will ensure that the retail heart of the Town is retained. The Local Plan Part 2: Development Sites and Policies will look to implement appropriate policies regarding appropriate uses within Fareham Town Centre.

4. Vacancy rates

The vacancy rates for the Borough's largest centres (as of Autumn 2013) are shown below.

Centre	No. of vacant units	Percentage vacant units	Percentage of floorspace
Fareham (primary)	15	10.37%	9.30%
Fareham (secondary)	12	7.59%	7.00%
Fareham (Town Centre)	37	9.56%	5.00%

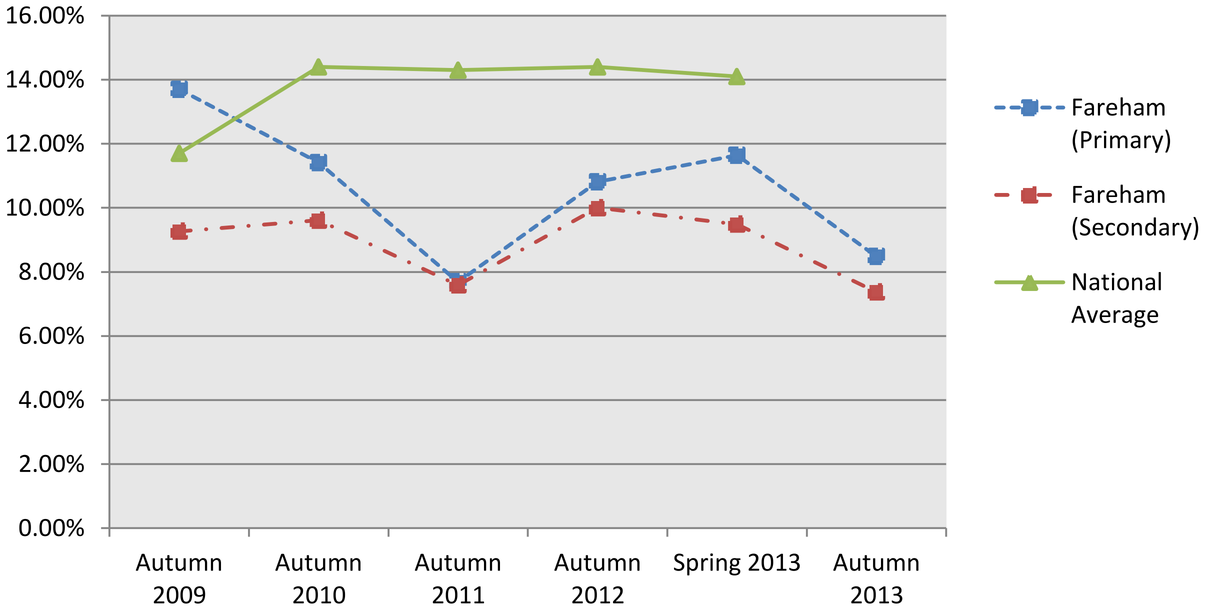
Vacancy rates in Fareham Town Centre had been on the rise in recent years. The past six months saw a drop in the vacancy rate. This would be contrary to unrealised fears that the recent Whitely retail development would have a detrimental effect on the vibrancy of Fareham Town Centre. However this could be attributed to the uplift associated with the festive period. This will continue to be monitored in line with Planning Policies.

Since the Summer, Fareham's Primary Shopping Area has seen a reduction in vacant units by 2 units. The Secondary Shopping Area has seen a similar reduction in vacancy rates with three units being brought back into use. As noted before this may be a reflection of the build up to the festive period. This trend will be reviewed in the Summer Retail Health Check.

There is also an increasing number of occupiers (in particular within Fareham Shopping Centre) that benefit from temporary free lets during a period when units are unoccupied, such as Barnardo's, Girlguiding and Alzheimer's Society. For the purpose of this report, these units were classed as occupied.

When compared with the national average, it is clear that Fareham's Town Centre performs particularly well, despite the current economic downturn.

4.1.2 Vacancy Rates over Time (% of overall units)



5. Comparison with other town centres

Literature (such as publications from Urban and Economic Development Group, Department for Business, Innovation & Skills etc.) suggests that KPIs are only useful if combined with some elements of comparison with other centres, including their relative roles, strengths and weaknesses, and impacts on each other. The centres Fareham could be compared with are: Gosport, Havant and Eastleigh. The following comparison looks into retailer representation and level of vacant units. This should help to identify what is missing in Fareham and why. It is also worth noting that these comparisons are based on the Summer Retail Health Check 2013. For a comparative view a year on year comparison will be conducted during the next Summer Retail health Check.

5.1 Gosport Town Centre

Gosport is located on a peninsula, south of Fareham and west of Portsmouth Harbour opposite the City of Portsmouth, to which it is linked by a pedestrian ferry. Gosport has got no operational railway system and therefore it relies heavily on the A32 road in and out of the town and recently completed Bus Rapid Transit that provides an additional access between Gosport and Fareham. According to ONS (2011), Gosport has a population of 82,622 people with the average age of 39.8 and average gross weekly income of £398.

Gosport town centre is located within the south eastern part of the borough and includes shops located on High Street, alleys running off of High Street, and area north of South Street where some large retail units, Gosport Shopping Precinct and council offices are situated. Other than the Gosport bus station and ferry office, nearby waterfront locations are not included within the town centre boundary.

Most of the shopfronts within the centre are attractive and well maintained, although some would benefit from an uplift. There are a variety of sitting places, including benches in shaded areas across the centre and designated sitting areas, such as in Lawrence Square, just by Gosport Discovery Centre, and west of The George & Dragon Public House. The external environment is enhanced by trees and plants.

Similar to Fareham, Gosport does not offer public open space within the town centre boundary. It is, however, in a close proximity to the Gosport promenade, which offers scenic views towards Portsmouth, and Walpole Park, located on the west end of High Street and hosting GosFest – the annual Gosport Community Festival.

As in Fareham, Gosport High Street is pedestrianized and successfully accommodates sitting furniture associated with cafes and restaurants, free standing street advertisements and cycle racks not to pose any obstruction to pedestrians.

The centre does not have a problem with litter or graffiti. There is also no apparent source of noise or air pollution.

There were 164 units recorded within the centre, 22 (13.4%) were vacant, 7 (4.2%) were occupied by charity operators and 61 (37%) by national retailers. Not all of the retail groups and town centre uses are represented here. Similar to Fareham, there is no local butcher, greengrocers, delicatessen, wine bars or a late night venue/club. However, unlike in Fareham, there is also no bookstore (other than Cornerstone Christian Bookshop), florist or a gift shop etc. As to the leisure provision within the centre, there were 7 units offering recreational use. This amounts to 4.2% of overall unit number. This is 3 units (1.5%) more than in Fareham.

There are two supermarkets located within the town centre boundary: Morrisons, located at the western entry to the High Street and Iceland, located further east. Waitrose and Asda are located just outside of the centre boundary.

During the site visit, the centre was fairly busy and vibrant. Although there were no people sitting outside, however, this could be ascribed to the cold weather conditions experienced that day.

5.2 Havant Town Centre

Havant is a historic town located between Portsmouth and Chichester, approximately 10 miles east of Fareham. It has a railway station located on the northern boundary of its centre that links it with Portsmouth, London and Brighton. Havant also benefits from a close connection to A3(M) and A27.

Havant town centre is built on a classic crossroad configuration, with four streets being named North Street, East Street, South Street and West Street. The centre comprises of some 195 units located within the four streets, the Meridian Shopping Centre and Market Parade. According to ONS (2011), Havant has a population of 120,684 people with the average age of 42.3 and average gross weekly income of £401.

Other than Market Parade and parts of West Street that accommodates farmers markets every Tuesday and Saturday, the shopping streets within the centre area not pedestrianized and serve two-way traffic. The footpaths are not very wide but generally clutter free with some cycle racks located close to the buildings. The main designated sitting areas are situated in Market Parade, Havant Park and on West Street. The external environment is enhanced by young trees, flowers and plants, i.e. by the main entrance to the Meridian Shopping Centre. Some parts of the centre would, however, benefit from redevelopment or refurbishment, principally Market Parade and the northern part of North Street. Similar, dated shopfronts would benefit from an uplift.

Unlike Fareham, Havant town centre benefits from a close and easy accessible public open space: Havant Park with a separate children playing area, situated north of the town centre.

The centre does not have a problem with litter or graffiti. There is also no apparent source of noise or air pollution.

Out of the 195 units surveyed, 28 were vacant (14.3%), 8 (4.1%) were occupied by charity operators and 72 (37%) by national retailers. Not all of retail groups are represented here. Similar to Fareham, there is no local greengrocer, delicatessen, fishmonger or late night venue/club. Unlike in Fareham, there is a local butcher. The two main supermarkets in the centre are Waitrose and Iceland. Tesco and Aldi are located further away from the main shopping streets, west of Park Road South, within Solent Retail Park that hosts larger retail units occupied by Wickes, Dreams, Carpet Right, Next, Halford, Pets at Home, Pizza Hut and others. Havant has got higher than national average vacancy rates. Vacant units are noticeable despite the use of fake shopfronts.

As to the leisure provision within the centre, there were 6 units offering recreational use. This amounts to 3% of overall unit number, which is 4 units less, but 0.3% more than in Fareham.

The site visit to the centre took place on a market day. It was evident that the market attracts shoppers to the centre. The centre was not as busy and vibrant in later hours. Areas experiencing higher vacancy rates were particularly quiet, such as Market Parade. Both the bus station and train station are in highly accessible locations and experience higher footfalls.

5.3 Eastleigh Town Centre

Eastleigh is a railway town located between Southampton and Winchester, approximately 15 miles north west from Fareham. It has good public transport links as well as close connection to the M27 and M3 motorway. Eastleigh town centre is a compact centre built on a grid street plan and comprising of approximately 220 units located on Market Street, Leigh Road, High Street and in the Swan Shopping Centre. According to the ONS (2011), Eastleigh has a population of 125,199 people with the average age of 40.1 and average gross weekly income of £441.

Eastleigh town centre offers a quality shopping environment. The shopfronts are attractive and well maintained. The units within the main shopping streets are equipped in clear canopies covering almost the whole width of the pedestrian footpaths. There is a variety of formal and informal sitting places, including benches in shaded areas across the centre. The external environment is further enhanced by trees, plants and flower beds.

Unlike Fareham, Eastleigh town centre benefits from a close and easy accessible recreational ground, situated north of the Swan Centre, with a Victorian bandstand hosting Eastleigh Festival of Music, a separate children outdoor play area and a statue of the Railway Man. The Point, a contemporary arts venue, is located west of the recreational ground.

The streets in the centre are not pedestrianized, however, they only carry one-way vehicular traffic which does not appear to harm the overall environment. Other than sitting furniture associated with cafes and restaurants and a few free standing street advertisements, the footpaths are generally clutter free. Sheffield cycle racks are located on the verges of pedestrian footpaths, outside of the covered areas and pose no obstruction to pedestrians.

Finally, the centre does not have a problem with litter or graffiti. There is also no apparent source of noise or air pollution.

There are three supermarkets within the town centre boundary: Sainsbury's located on Leigh Road / Upper Market Street, Tesco Metro located within the Swan Shopping Centre and Lidl located further away from the main shopping area, on Station Hill, north of train station.

The easternmost part of the Shopping Centre accommodates Vue Cinema, AMF Bowling, fitness club, children's play centre and a number of bars and restaurants, including Prezzo, Nandos, Harvester, Chimichanga, The Real China and Frankie & Benny's. All these businesses are clustered, supporting each other and creating a separate, small-scale night-time economy quarter that maintains the vitality and vibrancy of the centre during late hours, after the shops are closed.

Out of the 222 units surveyed, 24 were vacant (10.81%), 12 (5.4%) were occupied by charity operators and 108 (48.6%) by national retailers. Most of retail groups and town centre uses are well represented. Unlike in Fareham, there is a local butcher, greengrocers, delicatessen, stationery store, wine bars and a late night venue/club. Furthermore, there is a Travelodge hotel located just outside of the main shopping area, opposite the railway station.

During the site visit, the centre was busy and vibrant with people sitting outside at the cafes tables or in the public sitting areas. The recreational ground, together with the children outdoor play area was also well used. It is clear that this part of the town attracts not only shoppers but also leisure walkers and people braking for lunch. This shows that a public open space located in an accessible location not only improves the quality of the environment but also attracts more people to the centre and contributes towards its vibrancy and vitality.

As to the leisure provision within the centre, there were 19 units offering recreational use. This amounts to 8.5% of overall unit number. Fareham has got only 10 units, which is 2.7% of the overall unit number. Given the marginal difference in population size and average age, it could be said that Fareham does not provide sufficient recreational offer when compared to Eastleigh.

5.4 Whiteley Shopping Centre

Whiteley Shopping Centre is a new shopping centre, opened on 23 May 2013, located about a mile from junction 9 on the M27. The centre can also be accessed by bus, operated by First Group, to and from Whiteley and by train, Swanwick rail station is located within a 25 minute walk from Whiteley Shopping. The centre provides 1500 parking spaces across 6 car parks, with free parking for up to 3 hours. The parking is also free between 6pm and midnight, when the car parks close.

The centre offers over 40 shops, including superstores (M&S, Tesco), clothing stores (Next, H&M, Topman, Clarks, JD Sports, River Island, Sports Direct and Phase Eight etc.) and other retailers, such as Thomson, Ladbrokes and Vision Express. There is also an estate agent, jeweller and optician.

As to cafes and restaurants, the centre accommodates Caffe Nero, Chimichanga, Frankie and Benny's, Harvester, Costa Coffee, Prezzo, Starbucks, Subway and an independent bistro Montagu's.

The centre also caters for independent retailers and start-up businesses, by allocating a specific area ("Market Square") for this purpose and Treehouse building, which is a unique project designed to act as an "incubator for new retailers, giving retailers the opportunity to trial new concepts". The independent retailers and services represented here are: Fabulous Bakers, Hair Ott, Little Soles, Montagu's, Solent Cycles, Sweets & Treats, Walker & Waterer, Whiteley Fruiterers and Xpress Beauty.

It is likely that the variety of shops, cafes and restaurants will attract many customers that would otherwise shop in Fareham Town Centre or Locks Heath District Centre. The proposed cinema, which is now granted planning permission, will further contribute to this trend.

5.5 Conclusions

The above centres have been chosen for this comparison as they are of similar size, they possess similar demographic characteristics and are located within South Hampshire, meaning that they should be subjected to similar socio-economic challenges. The information gathered during site visits and through a desk study allows for some comparison. This exercise was undertaken for the first time as part of the retails checks and was limited to retailer representation, levels of vacancy and the quality of shopping environment.

In terms of unit numbers, Fareham is the largest centre. It also has the highest number of vacant units, however, when looking at the vacancies in terms of percentage, it has the lowest percentage. Out of the centres compared, Fareham has the lowest number of national retailers, which to some extent can be explained by the presence of many independent stores and start-up businesses located within the Secondary Shopping Area, within the westernmost part of West Street.

Comparing further, Fareham has got the highest percentage of A3 restaurant/café/eating out units (12.8% whilst Havant and Gosport have approximately 8.5%) and the lowest percentage of leisure units (only 2.7%, whilst Eastleigh has got 8.5%). This is not surprising, given the number of recently opened new cafes within Secondary Shopping Area. As to the leisure uses, Fareham Town Centre is limited in terms of availability of units that could accommodate this type of use. Finally, Fareham has got the lowest number of charity shops: 3.8%, whilst Eastleigh has got the highest: 5.4%.

Furthermore, given the size of Fareham Town Centre and comparing with the other centres, it could be said that Fareham lacks in local butchers, greengrocers, delicatessen, stationery stores, wine bars and a late night venue/clubs.

As in other centres, Fareham Town Centre accommodates two supermarkets within its boundary: Aldi, located in westernmost part of the centre, and Tesco, located in south eastern part. This is very similar to the other centres that tend to have two national retailer superstores.

As to the appearance and quality of the environment, most of the shopfronts in Fareham are attractive and well maintained, however, some would benefit from an uplift, for example, some shopfronts located within Secondary Shopping Area. There is variety of sitting places, including benches in shaded areas across the centre. Unlike in other town centres, Fareham does not have designated sitting areas, public places and public open space or a park. However, there is a children playing area situated within eastern part of pedestrian area of West Street. The external environment is enhanced by young trees and plants.

It is possible that an easy accessible public open space with nearby cafes, children outdoor play areas etc. also attracting leisure walkers and working people breaking for lunch would enhance the overall quality of the Town Centre environment and would attract more people to the centre contributing towards its vibrancy and vitality. Similar, wider range of leisure venues, as in Eastleigh and Whiteley Shopping Centre, would attract more visitors during evening hours improving the Centres night-time economy.

Finally, as in other centres, Fareham has no apparent problem with litter or graffiti, noise or air pollution.

To conclude, it could be said that Fareham Town Centre performs well, however, some improvements could be made, such as attracting new uses to the Centre and improvements of the quality and accessibility of nearby open spaces. This is particularly important when accounting for the additional challenges and that Centre faces, such as national economic decline and additional local competition.

The below tables show the differences between the compared centres, in terms of demographics, retailer representation, car parking charges.

Demographics

Town	Population	Average age	Average gross weekly income
Gosport	82,622	39.8	398
Havant	120,684	42.3	401
Eastleigh	125,199	40.1	441
Fareham	111,581	42.6	456

Retailer representation (number of units and percentage of units)

Town Units	Vacancies	National Ret	A3 Eating Out	Leisure	Charity
Gosport 164	22 13.4%	61 37%	14 8.5%	7 4.2%	7 4.2%

Havant 195	28	14.3%	72	37%	16	8.2%	6	3%	8	4.1%
Eastleigh 222	24	10.8%	108	48%	24	10.8%	19	8.5%	12	5.4%
Fareham 367	39	10.6%	132	36%	47	12.8%	10	2.7%	14	3.8%

Average Car Parking Charges Mon-Sat

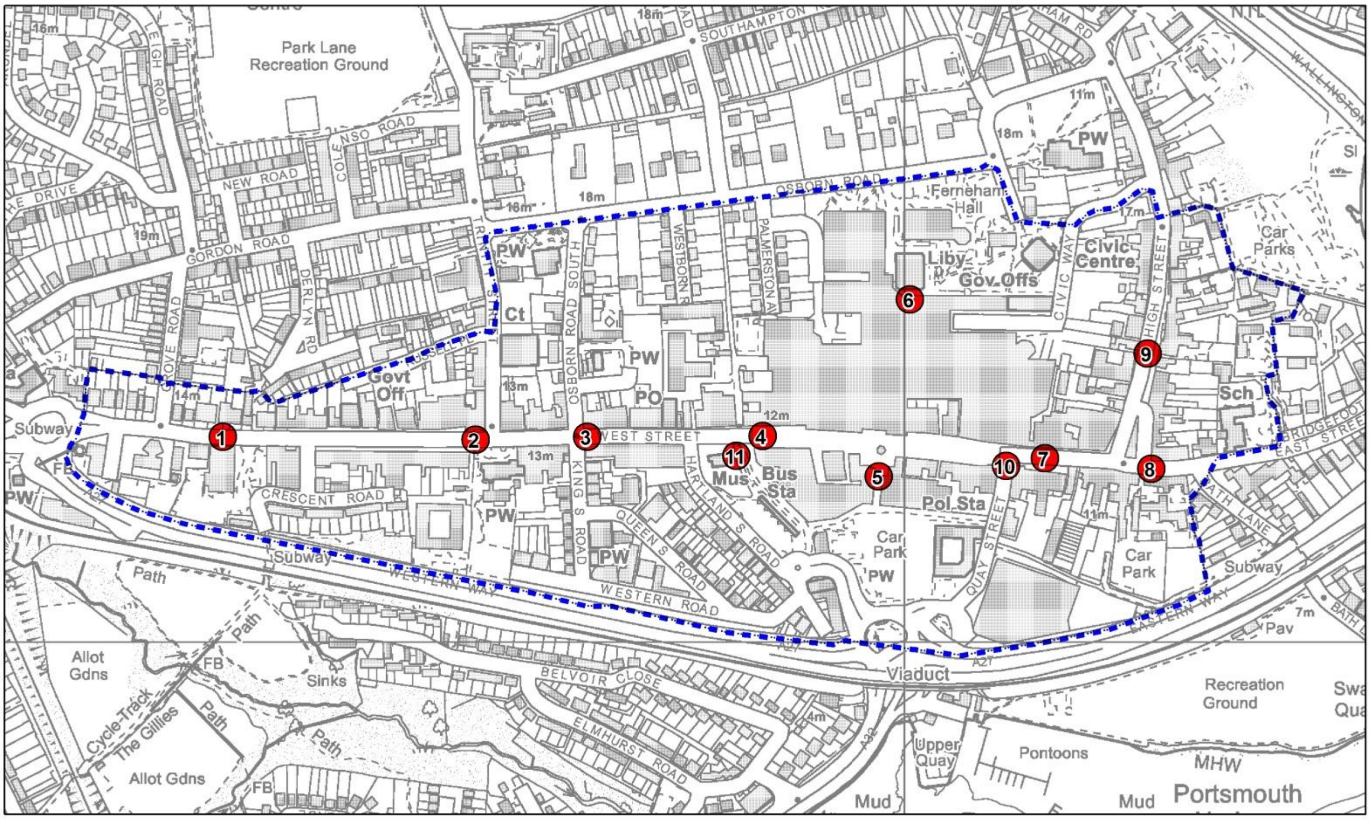
Town	up to 1 hr	up to 2 hrs	up to 3 hrs	up to 4 hrs	up to 5 hrs	over 5 hrs	Maximum charge
Gosport	£0.30-£0.80	£0.60/1.60	£2.10/2.40	£2.80/3.20	£3.50/ £4.00	£4.00-£5.00	£4.00
Havant	£1.00	£1.60	-	£3.00	£5.00	£5.00	£5.00
Eastleigh	£0.90-1.30	£2.60	£3.40	£4.20	£5.20	£8.00	£13.00
Fareham Inner	£1.00	£2.00	£3.00	£4.00	£5.00	-	-
Market Quay	£1.50	£3.00	£4.50	£6.00	£7.50	-	-
Outer	£0.70	£1.40	£2.10	£2.80	-	£3.50 (up to 10 hrs)	-

6. Pedestrian Flows

6.1 Autumn 2013 Counts

Footfall counts were taken at 11 locations throughout Fareham Town Centre to ascertain the busiest parts of the town, and how levels of pedestrian traffic dropped away outside of the Primary Shopping Area. The footfall counts were taken between 11:00 AM and midday on Friday 8th November, Saturday 16th November and Monday 18th November. The reason for undertaking counts on three different days of the week was to ascertain the effect of Fareham's weekly market (held every Monday) on the number of pedestrians in the Town Centre, and also how many more pedestrians visited the Centre on a Saturday, traditionally the busiest day. The 11 locations are shown in the map below. These were chosen as they represent the major entry and exit points of the Primary Shopping Area (3, 4, 5, 6 & 7) as well as points along High Street (9), East Street (8) and West Street (1 & 2) and entry points to the Secondary shopping area. In Autumn 2011, a new location at Quay Street, leading to the new Tesco store (shown as 10), was added and Hartland's Road, leading to Fareham Bus Station (shown as 11), was added in Autumn 2012.

Footfall Count Locations



Fareham Town Centre - Footfall Count Locations

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6.1.1 Pedestrian Footfall Counts Results

Location	Footfall Count per hour (Friday 8th November 2013)	
1	East: 186	West: 210
2	East: 396	West: 336
3	East: 540	West: 348
4	East: 1560	West: 1212
5	North: 678	South: 768
6	North: 732	South: 810
7	East: 258	West: 294
8	East: 96	West: 96
9	North: 36	South: 30
10	North: 144	South: 204
11	North: 210	South: 420

Location	Footfall Count per hour (Saturday 16th November 2013)	
1	East: 96	West: 180
2	East: 192	West: 336
3	East: 1044	West: 948
4	East: 1932	West: 2268
5	North: 1248	South: 1032
6	North: 1488	South: 1440
7	East: 480	West: 528
8	East: 60	West: 36
9	North: 96	South: 264
10	North: 324	South: 528
11	North: 336	South: 348

Location	Footfall Count per hour (Monday 18th November 2013)	
1	East: 180	West: 204
2	East: 426	West: 324
3	East: 636	West: 588
4	East: 1716	West: 1788
5	North: 744	South: 588
6	North: 1008	South: 1368
7	East: 372	West: 288
8	East: 72	West: 120
9	North: 48	South: 60
10	North: 360	South: 360
11	North: 456	South: 468

The tables above reinforce the position of the primary shopping area with the highest foot traffic being recorded in locations 4, 5 and 6. The table also shows that, in the daytime at least, more people enter the Primary Shopping Area from the west (4) and the north (6) than any other route. This is perhaps unsurprising, given that location 4 and 6 are the main entry points to the shopping precinct. Location 5 includes all those who park in Market Quay car park, and as such shows a relatively high amount of pedestrian traffic. It would probably represent a higher proportion of total traffic if a count was done in the evening, when the Reel Cinema and Nando's restaurant attract more visitors and the Market Quay car park becomes free.

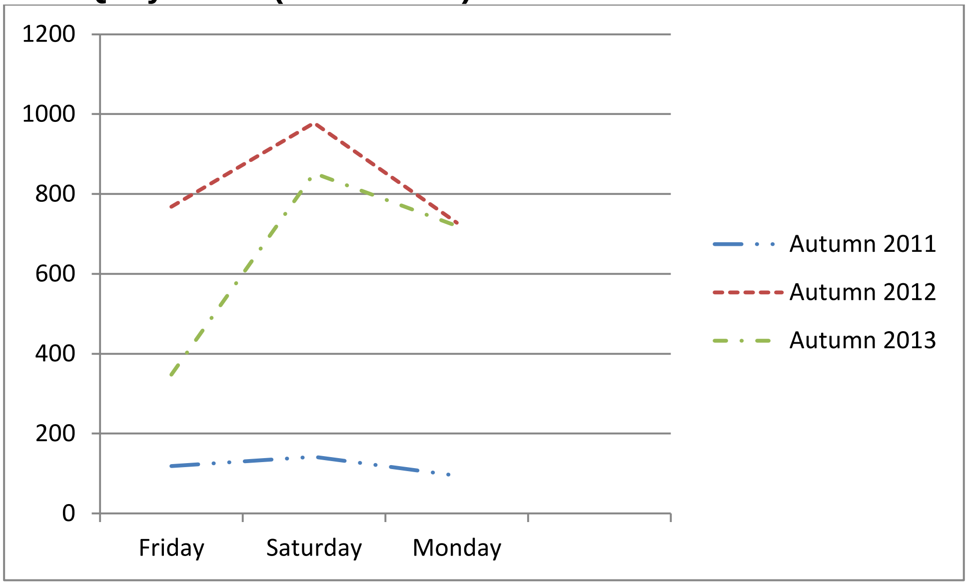
As expected, the counts fell at locations further away from the Centre, with steady decreases seen along West Street, and limited counts along High Street and East Street, possibly due to the lack of car parking in these areas as well as retail units.

For the purpose of this exercise, the total numbers recorded in the new locations mentioned above have been deducted when comparing with total numbers recorded in previous years. These numbers will be compared in future years, when more data is collected to allow for more statistically significant analysis. Numbers recorded in Quay Street are compared with numbers recorded in previous years.

As in previous years, the highest amount of pedestrian traffic was recorded on Saturday (15,204 pedestrians). The total recorded on Saturday was 24.89% higher than on Monday (Monday market day) and 58.97% higher than on Friday this year. When compared with the previous footfall count taken in Summer 2013, the numbers recorded on Saturday this year were 22.65% higher, numbers recorded on Monday were higher by 20.77% and numbers recorded on Friday were 2.2% higher. A more accurate comparison of these figures would be to view them in the context of the Autumn 2012 counts. Set against that base date, the Saturday count was up 11.5% while Friday and Monday were down 23.25% and 7.18% respectively.

With regard to the additional locations added recently, at Quay Street leading to the new Tesco store and at Hartland’s Road leading to Fareham Bus Station, the busiest location this year was Hartland’s Road on Friday. More in depth analysis of these new locations will be possible in future years when more data will be collected. The current data held on these new nodes does show some changes brought about by development, in particular the new Tesco store. Below is a graph showing the uplift in the footfall counts recorded at Quay Street (Location 10) before and after the opening of the store.

6.1.2 Quay Street (Location 10) Footfall Time Series

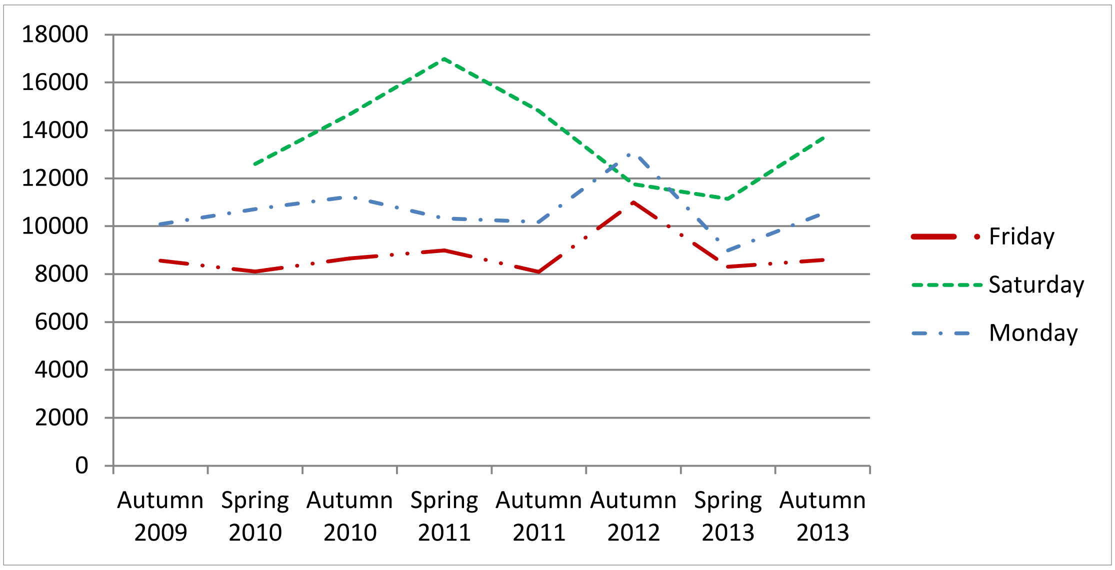


Year on year there was an uplift of 594.94% from Autumn 2011 to Autumn 2012. While the recent count shows a fall of 22.39% on the previous year this is still representative of an uplift of 439.33% from the base figure. As evidenced by the tables above the highest change in footfall was to the south towards the new Tesco Store. This would seem to underline its importance as an attractor node. The presence of an undercroft carpark within the confines of the supermarket would go some way in explaining the nearly equal flow of pedestrians in the opposite direction towards the town centre. Further data will shed more light on the trends observed.

6.2 Pedestrian Counts over Time

As shown in diagram below, the numbers of pedestrian recorded this year generally have fallen down. Footfall counts recorded on Monday were the lowest Monday counts since beginning of the survey in 2009. The counts recorded on Friday were similar to the ones recorded historically, however, significantly lower than last year. Saturday counts were higher than counts taken on Mondays and Fridays over previous years, however, similar to counts recorded on Monday, they were historically the lowest (over 80% lower than the highest counts recorded in Spring 2010). This is surprising given that the Fareham Farmer's Market took place on that day. This could be explained, to some extent, by hot weather conditions experienced during that period. It is possible that many potential visitors altered their Saturday plans and stay indoors or, on the contrary, chose activities and locations that could be enjoyed during summer weather.

6.2.1 Times Series for Pedestrian Counts



The data above shows how the total number of pedestrians, visiting Fareham Town Centre on the different days, has changed over time. It will become more useful in future years when more counts will have been undertaken. It is important to note that the count on Saturday 24th October 2010 (Autumn 2010 in table above) coincided with an event being held in the Town Centre which may have influenced the figures. The Monday count for Autumn 2010 also coincided with the school half term which may also have had some influence. The Saturday count for Autumn 2012 was made during severe weather conditions which may explain the sudden drop in numbers recorded. The count for Autumn 2013 was conducted under undesirable weather conditions which may explain the reduction in overall footfall counts across the three days

7. Amount of Retail, Leisure & Office Floorspace in "Out of Town" and "Edge of Centre" Locations

7.1 Office Floorspace

Fareham has a considerable amount of office floorspace in out of centre locations (approx. 174,216sq.m)(as at Summer 2013). The majority of this floorspace is located as part of wider employment sites, which usually benefit from good transport links, prominent or semi-prominent locations and relatively cheap land values. The major employment areas of Segensworth (East & West, including Office of National Statistics), Newgate Lane and Broadcut/Fareham Industrial Park all house varying levels of office floorspace. Other office development is clustered around key road networks in order to be as accessible as possible for workers commuting by car. In Fareham this is shown along Wickham Road, at Furzehall Farm, Parkway and the Potteries.

Other sites have less generic reasons for being in out of centre, for example Cams Hall is a large area of office development that re-used a country house, and associated out buildings to provide a high quality business park based mainly on the high capacity fibre optic broadband link. Another unique example is the single largest provider of "out of town" office floorspace, the National Air Traffic Services building, which is located away from the larger urban areas in the Borough partly for security reasons.

List of office floorspace in out of centre locations

Site	Location	Floorspace
The Gardens, Broadcut	Edge of centre	2,395sq.m
Quayside, Lower Quay	Edge of centre	987sq.m
North of Park Gate, Botley Road	Edge of centre	3,198sq.m
Waterside House, Waterside Gardens	Edge of centre	3,796sq.m
Fareham Heights, Standard Way	Out of centre	5,420sq.m
Parkway, Wickham Road	Out of centre	5,790sq.m
Furzehall Farm, Wickham Road	Out of centre	5,618sq.m
The Potteries, Wickham Road	Out of centre	2,060sq.m
Office for National Statistics	Out of centre	17,997sq.m
Segensworth East	Out of centre	21,642sq.m
Segensworth West	Out of centre	13,728sq.m
Enterprise Centre, Newgate Lane	Out of centre	1,290sq.m
Funtley Court, Funtley Hill	Out of centre	2,334sq.m
Brook Avenue/Brook Lane	Out of centre	1,632sq.m
Delta Business Park, Salterns Lane	Out of centre	2,276sq.m
Barnbrook Systems, Fareham Park Road	Out of centre	956sq.m
Oslands Court, Bridge Road	Out of centre	368sq.m
Kites Croft, Warsash Road	Out of town	4,044sq.m
National Air Traffic Services	Out of town	59,625sq.m
Cams Estate, Cams Hill	Out of town	18,952sq.m
316 Botley Road	Out of town	468sq.m
TOTAL		**174,216sq.m**

7.2 Retail Floorspace

Fareham has three "out of centre" retail areas not including parades and local shops. These are typified by large retail sheds or supermarkets adjacent to the major road network and accompanied by large levels of car parking. The largest of these areas in Fareham is the Speedfield Park/Collingwood Retail Park area on Newgate Lane which takes advantage of the busy main route between Gosport/Stubbington/Lee on Solent and Fareham.

List of retail floorspace in out of centre locations

Site	Existing Stores	Floorspace
Newgate Lane	ASDA, Homebase, Elliots, Wickes, B&M, Topps Tiles, Lidl, Blockbuster, Pets at Home, Carpets 4 Less	28,886sq.m
Southampton Road	Argos, B&Q, Comet, Halfords, Currys, Carpetright, Smyths Superstore, Pets at Home, Benson for beds, CarpetBarn	19,883sq.m
Broadcut	Sainsbury's, Dream Beds, Staples	7,261sq.m
TOTAL		**56,030sq.m**

Besides the limited expansion of Sainsbury's, Broadcut and some internal mezzanine floors at Halfords and Comet, Southampton Road and ASDA(Newgate Lane), no large scale retail floorspace has been permitted out of centres in recent years, which reflects the change in national policy to ensure development is focused in centres. However there was a net additional gain in retail floorspace through a mezzanine extension by Smyths Superstore.

7.3 Leisure Floorspace

Fareham has a reasonable amount of leisure floorspace located in out of centre locations mostly in the form of gym's and indoor sports facilities that require more space than is generally available in average centre units. The majority of the out of centre leisure floorspace is therefore located in industrial parks with lower land values, such as Soccer City, Broadcut and Fareham Snooker Club in Broadcut. However, the Borough's only cinema is within the main town centre, along with the Borough's only theatre, Ferneham Hall.

Site	Activities	Floorspace
Go Bowling, Collingwood Retail Park	Ten pin bowling	2,297sq.m
Soccer City, Fareham Industrial Park	Indoor football	550sq.m
Fareham Snooker Club, Broadcut	Snooker	519sq.m
Fareham Leisure Centre, Park Lane	Swimming pool, gym, indoor sports hall	4,946sq.m
Crofton Community Centre, Stubbington Lane	Indoor sports hall	2,485sq.m
Palmerston Indoor Bowls, Palmerston Business Park	Indoor Bowls	2,542sq.m
24/7 Fitness, Down End Road	Gym	1,086sq.m
TOTAL		**14,425sq.m**

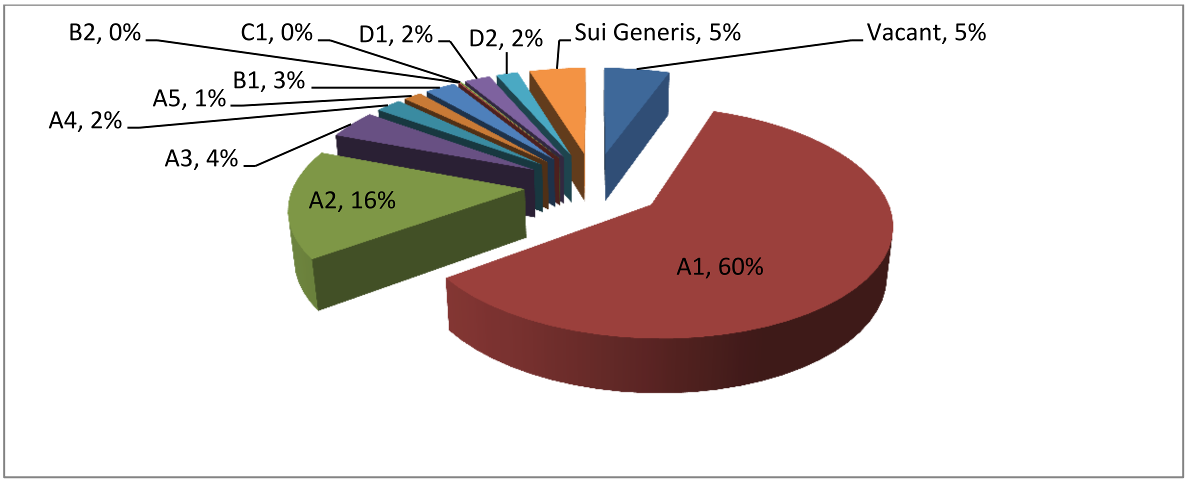
8. Appendices

Appendix A - Fareham Town Centre Data Sheets

Fareham Town Centre (overall)

	Number of units	% of total units	Change
Total	387		-11
USE CLASSES			
Vacant	37	9.56%	-3
A1	162	41.86%	0
A2	66	17.05%	-5
A3	28	7.24%	-1
A4	9	2.34%	+1
A5	10	2.58%	0
B1	14	3.62%	-3
B2	1	0.26%	0
C1	2	0.52%	0
D1	19	4.91%	+1
D2	10	2.58%	0
Sui Generis	29	7.49%	+1
RETAIL GROUP			
Vacant	37	9.56%	-3
Automotive	5	1.29%	-1
Clothing	30	7.75%	1
Convenience	14	3.62%	1
Eating Out	47	12.14%	0
Home & Electronics	25	6.46%	0
Mixed Retail	35	9.04%	-1
Other	18	4.65%	-5
Recreation	29	7.49%	+1
Services	90	22.26%	-2
Wellness	57	14.73%	-2

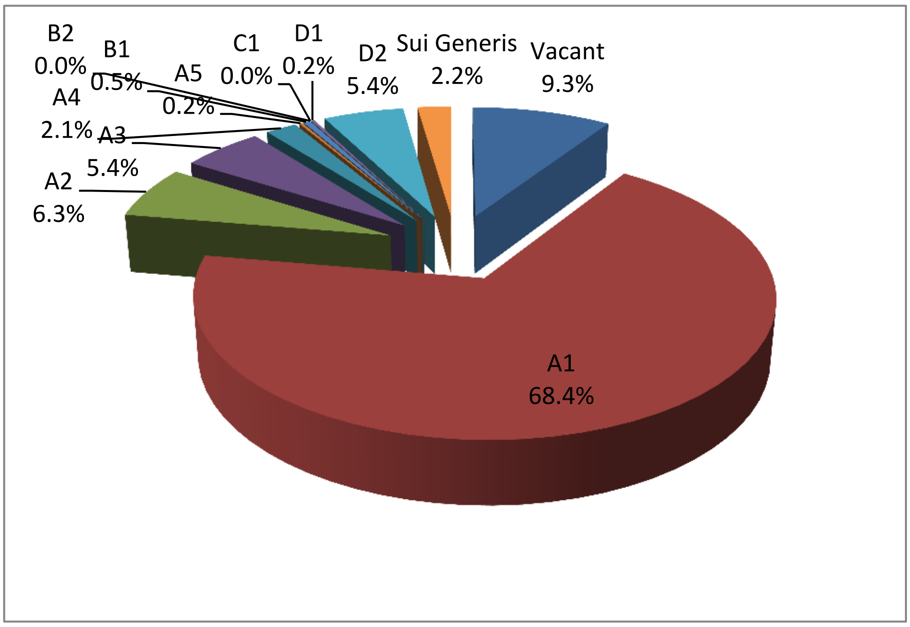
Distribution of Use Class as % of Floorspace



Fareham Town Centre (Primary Shopping Area)

	Number of units	% of total units	Change
Total	144		-3
USE CLASSES			
Vacant	15	10.42%	-2
A1	85	59.03 %	-1
A2	13	9.03%	-1
A3	11	7.64%	-1
A4	4	2.78%	+1
A5	1	0.69%	0
B1	2	1.39%	0
B2	0	0.00%	0
C1	0	0.00%	0
D1	1	0.69%	-1
D2	3	2.08%	0
Sui Generis	9	6.25%	+2
RETAIL GROUP			
Vacant	15	10.42%	-2
Automotive	0	0.00%	0
Clothing	21	14.58%	-1
Convenience	5	3.47%	0
Eating Out	16	11.11%	0
Home & Electronics	12	8.33%	+1
Mixed Retail	23	15.97%	0
Other	5	3.47%	-1
Recreation	10	6.94%	0
Services	18	12.50%	0
Wellness	19	13.19%	+1

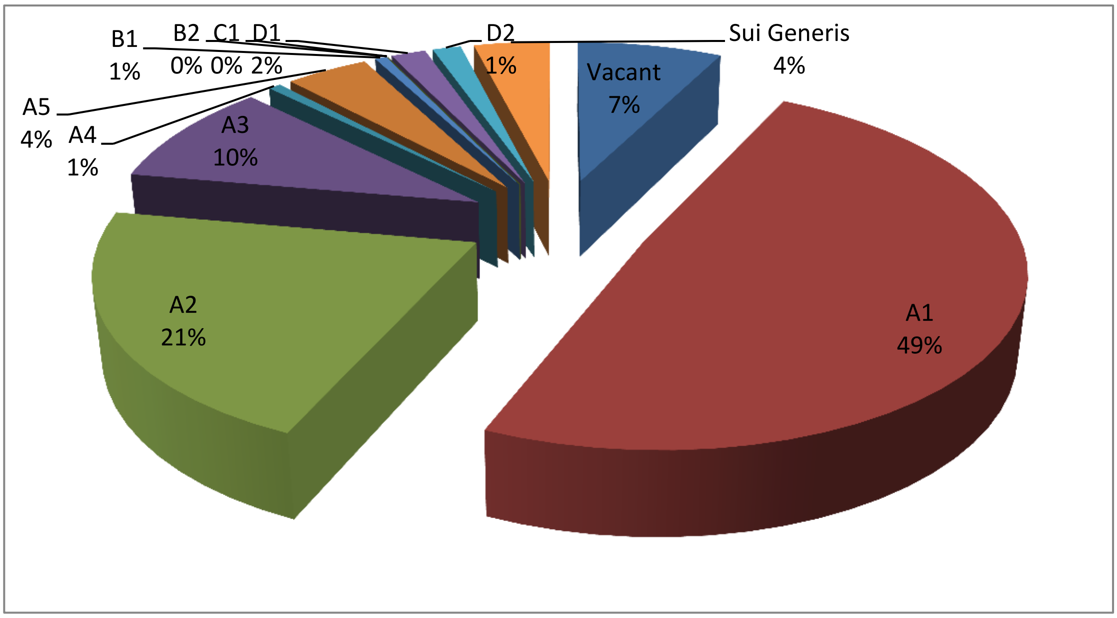
Distribution of Use Class as % of Total Floorspace



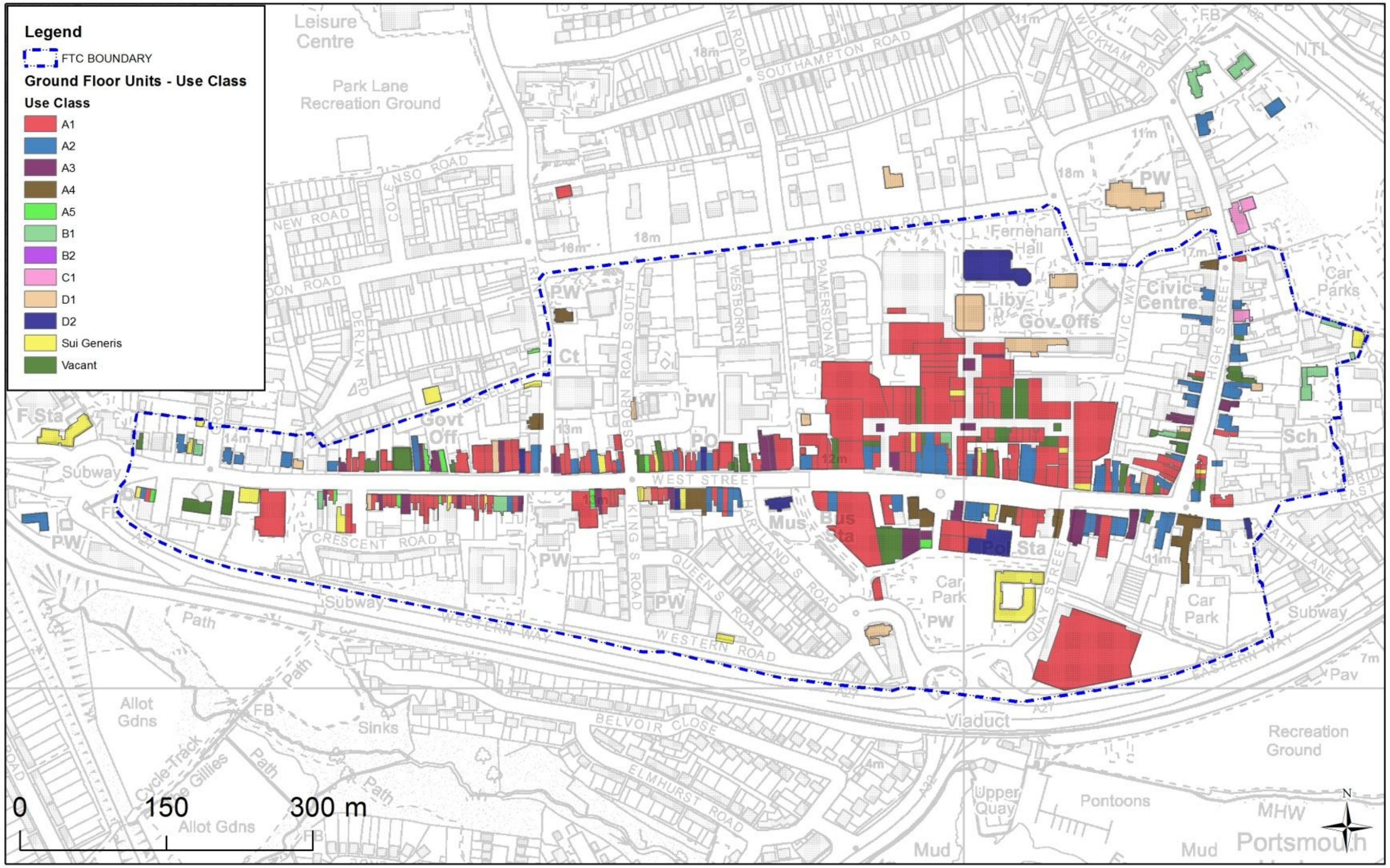
Fareham Town Centre (Secondary Shopping Area)

	Number of units	% of total units	Change
Total	150		-8
USE CLASSES			
Vacant	12	8.00%	-3
A1	67	44.67%	+1
A2	29	19.33%	-3
A3	13	8.67%	0
A4	2	1.33%	0
A5	7	4.67%	+1
B1	2	1.33%	-3
B2	0	0.00%	0
C1	0	0.00%	0
D1	5	3.33%	-1
D2	4	2.67%	0
Sui Generis	9	6.00%	+1
RETAIL GROUP			
Vacant	12	8.00	-3
Automotive	1	0.67	0
Clothing	8	5.33	+2
Convenience	8	5.33	+1
Eating Out	22	14.67	0
Home & Electronics	11	7.33	-1
Mixed Retail	11	7.33	-1
Other	7	4.67	-2
Recreation	16	10.67	+1
Services	31	20.67	-2
Wellness	23	15.33	-3

Distribution of Use Class as % of Total Floorspace



Map of use classes across Fareham Town Centre



Fareham Town Centre

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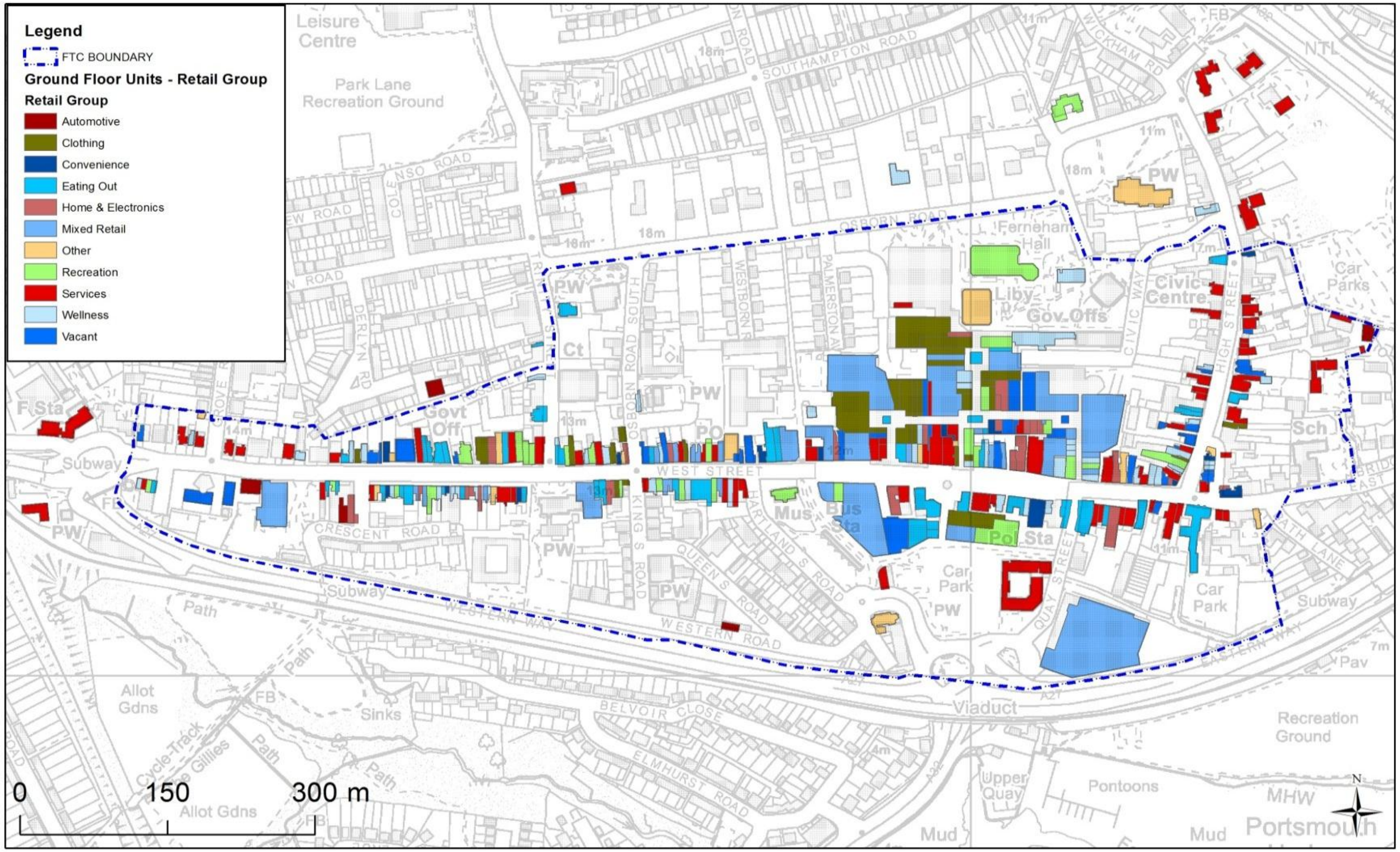
Map of retail groups across Fareham Town Centre



Fareham Town Centre

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