

# Havant and Waterlooville Retail and Town Centres Study

Prosperity Havant Background Paper  
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# 1. Introduction

- 1.1 This study assesses the economic performance of Havant and Waterlooville town centres. It is part of a range of background evidence papers that Havant Borough Council has prepared to support and inform the *Prosperity Havant* project. Similar papers have either been or are currently being prepared for Havant Borough's town and district centres, addressing themes including retail, employment, housing, strategic sites, public realm and car parking. The compilation of background papers form part of the evidence base to inform and support a future review of the Havant Borough Local Plan.
- 1.2 A range of data and information were used to prepare this background paper. For example: national and sub-regional policies, Local Plan policies, national retail reports, local audits of use classes and vacancies, Experian Goad retail floorspace data and reports on Havant and Waterlooville, crime data, background work undertaken for the previous Local Plan, and more recent local background studies, for example the car parking papers.

## 2. National Policy

### The National Planning Policy Framework (NPPF)

2.1 Paragraph 23 of the NPPF states that in drawing up Local Plans, local planning authorities should, amongst other things:

- *'recognise town centres as the heart of their communities and pursue policies to support their vitality and viability'*;
- *'define a network and hierarchy of centres that is resilient to anticipated future economic changes'*;
- *'promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres'*;
- *'allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres...'* so that the *'...needs for retail, leisure, office and other main town centre uses are met in full and not compromised by limited site availability'*;
- *'allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available'*; and
- *'set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres'*.

2.2 The Havant Borough Local Plan (Core Strategy) (2011) and Local Plan (Allocations) (2014) already fulfil the requirements of paragraph 23 of the NPPF. For example:

- The Core Strategy sets out the hierarchy of town and district centres in policy CS4, which is led by Havant and Waterlooville town centres at the top, followed by the four district centres (Cowplain, Emsworth, Leigh Park and Mengham/Gable Head) and then the ten local centres.
- It also states that retail development will be focussed on the primary shopping areas of the town and district centres and that *"the council will seek to promote and enhance its town, district and local centres by focusing development of a scale and of a kind that acknowledges the different roles each centre performs within the hierarchy"* (paragraph 3.39).
- It recognises the need specified at paragraph 24 of the NPPF (as well as recommended in the National Planning Policy Guidance) for a sequential approach to site selection as a test for applications for main town centre uses outside of existing centres.
- Core Strategy Policy CS4, together with policy DM19 of the Local Plan (Allocations) reflect the need, underpinned by the sequential tests, to promote and protect the vitality and viability of town, district and local centres at the same time as maintaining an element of

flexibility in order to be able to adapt to future economic changes. This approach accords with paragraph 21 of the NPPF.

## The National Planning Practice Guidance (NPPG)

- 2.3 The National Planning Practice Guidance (NPPG) states the need for a ‘town centre first’ approach which also takes into account specific town centre policies. It presents specific recommendations for town centre strategies which it states should include an assessment of the current state of the town centre and flag up any opportunities to meet future development needs. Market signals for retail uses and their impacts on town centres should also be identified and taken account of. These should include national trends and existing rates of development both in and outside of the town centre relative to planned levels of completions. The guidance also recommends that audits of town centres should be undertaken covering a three to five-year period, which take the lifetime of the Local Plan into account and are subject to regular review (paragraph 2b-003).
- 2.4 The NPPG also recommends that town centre strategies evaluate the options for individual centres and consider timeframes for the delivery of new retail floor space (paragraph 2b-003).
- 2.5 The NPPG goes on to advise (Paragraph 2b-005) that:
- ‘Not all successful town centre regeneration projects have been retail led or involved significant new development. Improvements to public realm transport (including parking) and accessibility as well as other measures promoted through partnership can also play important roles.’*
- ‘The strategy should identify relevant sites, actions and timescales and be articulated in the Local Plan, so as to enable it to be considered by residents and investors; and it should be regularly reviewed to assess the change in the role and function of different parts of the town centre over time.’*
- 2.6 This retail paper has been prepared in the context of the above advice and includes a section on public realm as well as a consideration of parking. A fuller assessment of parking provision in Havant town centre is presented in a separate background paper published by Havant Borough Council, whilst a transport study is to be commissioned as a separate study.
- 2.7 The NPPG suggests ten indicators of relevance that local planning authorities can use to assess the health of town centres; this background paper has considered data and information against each of these indicators for Havant and Waterlooville town centres in section 10 and 14.

# 3. Sub-Regional Background

3.1 Within the South Hampshire sub-region, Havant and Waterlooville town centres are categorised alongside Gosport and Southsea as medium sized town centres – see the map at Figure 1 below.



Figure 1: South Hampshire Strategy Key Map

3.2 The range and number of major comparison goods retailers in Havant, Waterlooville and other medium sized centres is naturally smaller than for larger centres such as Portsmouth, Southampton, Eastleigh and Fareham which have relatively larger catchment areas. As the closest city centre, Portsmouth’s sphere of influence includes both Havant and Waterlooville. Nevertheless both Havant and Waterlooville town centres benefit from the presence of major comparison retailers, including retail parks, within their boundaries.

3.3 Havant’s retail catchment area (the area within which residents travel into Havant to make comparison purchases) is ranked at position 347 out of more than 3,000 retail centres in the official Experian Retail Ranking<sup>1</sup>, based on total comparison spend, whilst Waterlooville’s retail catchment area is ranked at 292. See ‘Convenience and comparison goods spending patterns’, sections 10 and 14.

3.4 The South Hampshire Strategy<sup>2</sup> (2012, PUSH), aims to focus most future retail and other forms of development on Portsmouth and Southampton (Policy 1). This focus reflects and reinforces a

<sup>1</sup> Source: Retail Planner 2013, Experian

<sup>2</sup> published by the Partnership for Urban South Hampshire (PUSH) in partnership with local authorities across the PUSH sub region

national shift towards increased polarisation of retail development onto larger centres, something that is both a threat and an opportunity in relation to town centre vitality (see Section 5).

- 3.5 To combat the threat of loss of trade to larger centres and out of town locations, the South Hampshire Strategy states that, as a planning principle, plans should *'enable a full range of recreational, shopping, entertainment and cultural facilities focused in city/town centres to ensure the vitality of those centres and maximise the accessibility of the facilities'* (para. 1.7). The strategy calls for city and town centres to be positively planned, to claw back trade from out of centre locations; Policies 10 and 16 state that town and city centre development should include high quality mixed use schemes to enhance the centres' individual character, combining retail, offices, cultural and leisure/entertainment uses. Redevelopment strategies should also incorporate public realm improvements, including improved green infrastructure, conservation of heritage features and better access on foot, cycle and public transport (paras. 5.6-5.7).
- 3.6 Policy 10 also directly restricts the growth of out of town retail and leisure development. Havant's largest retail units are located within the Central and Solent Retail Parks, which operate successfully within the town centre boundary. New retail development has taken place within Havant town centre with the introduction of further retail units at Solent Retail Park and more comparison retail units are currently under construction on adjacent land between Solent Road, Brockhampton Lane and Selbourne Road. These units are set to be occupied by Marks & Spencer and Next. The presence of these businesses in Havant town centre should further increase its retail ranking against other competing centres.



# 4. The Changing Role of Town Centres

## The Portas Review

4.1 The adverse impact on town centres caused by the recession and the growth of e-commerce led to a series of influential reports on the future of town centres. The first was *The Portas Review: An independent review into the future of our high streets*<sup>3</sup>, which was commissioned by the Government and published in December 2011. This report highlighted the rise of supermarkets and their move into sales of a greater range of comparison goods, for instance stationery, books, flowers and homeware, as well as finance products and needs-based services such as opticians and doctors' surgeries that would previously have been found mainly in town centres. The report contained 28 recommendations. Those of most relevance to the study<sup>4</sup> are:

- the need to put in place a 'Town Team', which Portas defines as being a visionary, strategic and strong operational management team for High Streets;
- the need for Local Authorities to use their discretionary powers to give business rate concessions to new local businesses and independent retailers (along lines of those that charity shops were already receiving)<sup>5</sup>;
- the need for free, controlled parking schemes in town centres;
- amendments to the Use Classes Order to make it easier to change the use of key properties on the High Street, increasing flexibility and helping to encourage diversity and reduce vacancies, whilst placing a restriction on betting shops by a recommendation that they should have a separate Use Class – a suggestion that the Government has now implemented through amended legislation<sup>6</sup>;
- support for the use of lease structures other than upward-only rent reviews;
- further disincentives to prevent landlords leaving units vacant;
- the need for Local Authorities to make more proactive use of Compulsory Purchase Order powers to encourage redevelopment of key high street retail space.

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<sup>3</sup> Portas, M (2011) *The Portas Review: An independent review into the future of our high streets*, December 2011.

<sup>4</sup> Several recommendations in the report were not included in this list as they relate to proposed legislative changes, e.g. amendments to the Use Classes Order, which are beyond the Council's remit to influence.

<sup>5</sup> Business rate discounts of £1,000 were introduced by the Government for smaller retail premises for two years from 1<sup>st</sup> April 2014 (increased to £1,500 in the 2014 Autumn Statement) (<https://www.accountancylive.com/summer-budget-2015-business-rates-revaluation-and-reform>)

<sup>6</sup> (an amendment to the Use Classes Order to take betting offices out of A2 (financial services) and categorise them as sui generis uses was made in April 2015 under the Town and County Planning (Use Classes) (Amendment) (England) Order 2015)

# Beyond Retail

- 4.2 The Government's response to the Portas Review (*High Streets at the Heart of our Communities: the Government's Response to the Mary Portas Review*) included a commitment to work with an industry-led cross-sector Taskforce to look at a broad range of issues that have an impact on bringing commercial property into use or attracting investment in town centres.
- 4.3 The Taskforce report, *Beyond Retail: Redefining the Shape and Purpose of Town Centres*, was published in November 2013, and this built on Portas' observation of the decline of traditional town centres and suggested ways in which this decline, which is being accelerated by use of home delivery and click and collect services, can be harnessed to regenerate town centres or maintain their existing performance. The report recommends that local authorities actively intervene by pushing for "a smaller retail core, supplemented by the introduction of a wider range of uses such as food and leisure, accessible and affordable transport, housing, as well as a greater number of office and civic functions".
- 4.4 The Taskforce report notes that many town centres have too much retail floor space as a consequence of attempting to compete with out-of-centre developments and the trend for e-commerce and multi-channel shopping. It states further that this floor space is dated and of the wrong size and configuration to meet the needs of major multiple retailers, which have generally demanded larger units to accommodate their showrooms and merchandising. It argues that this trend should be countered by improving the leisure mix within town centres, by supporting local employment and residential uses close to the town centre and by reviewing car park pricing to make town centre shopping more attractive.
- 4.5 The report recommends:
- long-term master planning to strengthen retail cores, re-configure town centre spaces and re-use obsolete areas by defining new uses;
  - greater cross-border co-operation between local authorities to better understand the impact of evolving shopping patterns;
  - retail capacity models to be adapted for changing business requirements that will see the need for fewer stores;
  - proactive use of CPO powers in town centres to enable effective reconfiguration of space;
  - use of the private sector led Tax Increment Finance (TIF) model to help finance public infrastructure as part of new developments;
  - incorporation of strategies for use of digital and mobile technologies in town centres; and
  - reviewing the quality, perceived safety and ease of access to, as well as the price of car parking in town centres.
- 4.6 Havant Borough Council is working to implement the recommendations within the two reports in section 4 that are within its control and use its influence to implement the others. In relation to the recommendations of *the Portas Review*, there are a range of departments within the local authority working collaboratively to improve the town centre's environment for public benefit as well as that of retailers and businesses. Its planning and economic development teams work closely to support local businesses and improve economic performance, both in the town centre and the rest of the borough. There is free short-stay on-street parking available in the town centre as well as free off-street parking at the Solent and Central retail parks and at the Tesco and Waitrose car parks.

- 4.7 The Council continues to encourage restaurants and non-retail uses in the older town centre core. Compulsory purchase remains an option to enable effective space configuration for retail and other uses in the town centre, particularly in relation to implementation of the Market Parade LDO (as recommended in *Beyond Retail*).
- 4.8 The *Beyond Retail* report also recommends strategies for use of digital and mobile technologies. Havant is now covered by Virgin Media Superfast Broadband, which assists with the ongoing shift towards online shopping (discussed in more detail in section 5) as well as use of the Internet for home working and leisure.

# 5. National Trends in Retailing and the Economy

- 5.1 This section reviews the current retail market and social trends influencing the retail sector. It draws on published data sources, including research by The Centre for Retail Research, the Local Data Company and GVA.
- 5.2 The global recession, which started in 2008 and continued in the UK until the third quarter of 2012, caused a marked reduction in people's disposable income generally as a result of increased unemployment, low growth in incomes, and high housing costs. Despite this, there has been a continued and substantial growth in e-commerce and the evolution of multi-channel retailing throughout this period and the combined impact of these factors have had a very significant effect on town centres.
- 5.3 The rate of growth of retail expenditure per capita in bricks and mortar stores nationally fell during the recession, particularly in the comparison goods sector. As a consequence, many multiple chain stores nationally have closed or gone bankrupt (e.g. Borders, Woolworths), town centre vacancy rates have increased, and there has been a rise in the representation of charity shops, discount retailers, betting shops and payday loan businesses<sup>7</sup>. This creates negative perceptions of town centres to visitors and presents a threat to the long-term viability of town centres as retail or leisure destinations.
- 5.4 In the face of heightened competition from out of town retailers, there was an increase in the closure of multiple chain stores in 2014 compared to 2013. A study by The Local Data Company showed that out of 500 town centres there was a net reduction of 987 shops during 2014 as significantly fewer shops opened than closed their business premises. In the same year there was a net increase in occupancy of retail parks of 2.4%<sup>8</sup>.
- 5.5 More recently there have been signs of economic recovery with a 2.6% growth in gross domestic product (GDP) in the second quarter of 2015 compared to the same quarter in 2014<sup>9</sup>. Footfall at retail parks increased by 3.1% in the year to July 2015, although high streets continue to suffer with a 2.2% decline in footfall in town centres in the same year<sup>10</sup>.
- 5.6 Online sales in the UK in 2014 totalled £44.97bn, which was the highest out of any European country and online shopping in Europe is expected to continue to expand with 18.7% growth in online sales forecast for 2016<sup>11</sup>.

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<sup>7</sup> <http://www.theguardian.com/business/2010/jan/26/uk-recession-winners-and-losers>

<sup>8</sup> *Openings and Closures: Report Summary End 2014*, The Local Data Company, March 2015

<sup>9</sup> ONS Statistical Bulletin, Gross Domestic Product Preliminary Estimate, Q2 (Apr to June) 2015

(<http://www.ons.gov.uk/ons/rel/gva/gross-domestic-product--preliminary-estimate/q2-2015/index.html>).

<sup>10</sup> <http://www.retail-week.com/data/retail-parks-enjoy-best-footfall-growth-for-a-year-as-high-streets-suffer/5078076.article>

<sup>11</sup> Centre for Retail Research: <http://www.retailresearch.org/onlineretailing.php>

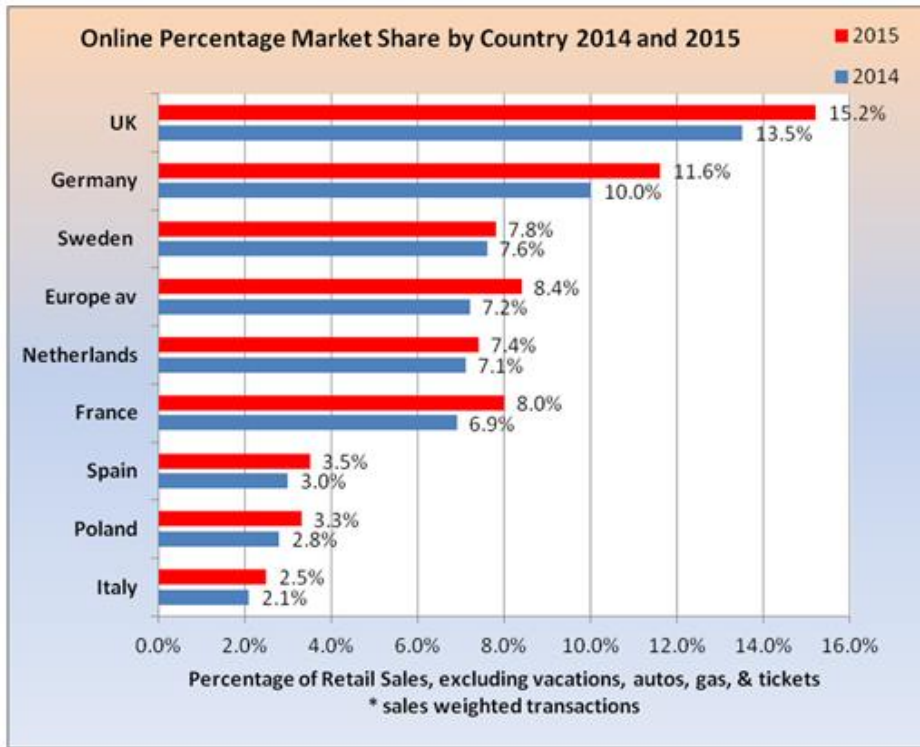


Figure 2: Online percentage market share by European Country

Source: <http://www.retailresearch.org/onlinereetailing.php>

- 5.7 Other digital channels for shopping have proliferated in recent years. Many retailers now report that up to one-half of website browsing occurs through customers using mobile devices, both smartphones and tablets. However a much smaller proportion actually uses their mobile device to make the final purchase, with other purchases made in-store or on the store's website, either for collection in-store or delivery to a home address<sup>12</sup>. This means that a smaller number of physical stores are required now to meet the needs of the retail public. Many successful retail chains have capitalised on this trend by offering interactive modes of shopping on their websites which enable customers to view products in three dimensions, compare different styles and then select from a variety of alternative channels as to how to make their final transactions<sup>13</sup>.
- 5.8 This shift away from in-store browsing habits presents a challenge to maintaining a traditional High Street retail presence, but it also provides opportunities to build current and ongoing trends into future planning for the town centre. The review of the Local Plan provides an opportunity to create a town centre that can adapt to the changing nature of retail, leisure and the night time economy. This may incorporate a wider range of non-retail uses, as recommended by the *Beyond Retail* study. Such an approach may be particularly effective at regenerating the heart of the town centre if it can be achieved as part of a comprehensive development. Planning options for creating a flexible town centre that can adapt to the changing retail/leisure markets would include making better use of outdoor assets, including Havant Park, creating high quality outdoor space for public interaction including seating areas (and provision of street cafes), provision of free Wi-Fi throughout the town centre, improved signposting, street paving and other public realm improvements. Havant possesses a wealth of local heritage which is somewhat hidden at present and so incorporating a consistent style of design which takes the town's local heritage into account and creates more of a traditional 'market town' feel could bring a unique sense of place to the town centre and be another way of making it even more attractive to retailers, shoppers and investors.

<sup>12</sup> Centre for Retail Research, <http://www.retailresearch.org/onlinereetailing.php>

<sup>13</sup> *Retail Futures 2018: Shop numbers, online and the High Street – A guide to retailing in 2018* (Centre for Retail Research, 2013)

- 5.9 The attraction of medium-sized town centres such as Havant and Waterlooville for comparison retail shopping will in future be heavily influenced by the national shift in the retail market. Major multiple retailers are no longer setting their sights on as many locations for new premises now as a decade ago, but instead tending to target bigger centres, particularly where they are able to accommodate larger footprint stores. Where there may be difficulty in attracting major multiples to a centre due to its existing floor space configuration, it could be worthwhile adopting a modern, alternative policy approach, which takes account of these market trends. One way of doing this could be to put in place plans to consolidate the retail shopping core or town centre boundary and allow more A2 and A3 uses, and/or changes of use to leisure, residential and community uses. Such a tactic should be supported by analysis of what is planned in competing towns<sup>14</sup>. This is looked at further as part of the review of town centre boundary of Havant town centre in Section 12 as well as in other recommendations in this paper.
- 5.10 Retention of traditional retail uses within the primary frontage of a town centre where they can be viably achieved may still be beneficial, but recent guidance indicates that a town centre's retail function does not need to be dominated by comparison stores. The NPPG (section 2) indicates the importance of schemes which are not retail-led. Meanwhile the *Beyond Retail* report (section 4) suggests that, in light of the departure of national comparison goods retailers from town centres, local authorities need to identify their town centres' future role in order to differentiate them from other competing centres and to continue to attract people to shop, work, socialise and spend time there. For example, services and convenience retail uses could form part of a convenience and service based centre, with an element of fashion and comparison goods and an improved leisure and evening offer.
- 5.11 Many smaller or medium-sized town centres including Havant and Waterlooville already have a strong provision of local services such as banks/building societies, hairdressers and coffee shops, in addition to convenience goods stores. Havant and Waterlooville not only have a good representation of these (see Sections 10 and 14), but also a considerable quantity of comparison retail floor space within their retail parks (Solent and Central Retail Park, Havant; and Wellington Retail Park, Waterlooville). The presence of retail parks within the boundaries of these two town centres places them at a distinct advantage over many other towns as they have a number of larger department stores and major food retailers within easy walking distance of the smaller-sized shops generally found in the more central parts of these town centres.
- 5.12 Havant and Waterlooville are therefore both well placed to adapt to the changing national trends in the retail market. The development of alternative non-retail uses will form an important part of Havant Borough Council's future strategy in response to the polarisation of shopping and ensure that these town centres are able to expand their existing roles as mainly retail centres to become vibrant social, commercial and cultural hubs.

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<sup>14</sup> Unlocking Town Centre Retail Developments, May 2012, GVA

### **National trends in retailing and the economy: Key findings**

- The nationwide growth in e-commerce and multi-channel shopping, combined with recessionary impacts, poses a challenge to maintaining a strong High Street retail presence.
- Increasing potential threat to viability of smaller and independent retailers in the town centre from supermarkets and other out-of-town retailers selling an ever-wider range of comparison goods and services.
- Havant and Waterlooville town centres are both well placed to adapt to the retail market trend of loss of national comparison retailers from town centres, particularly taking account the retail parks within their boundaries.

### **Recommendations:**

- Seek a wider range of uses including leisure, employment, food/catering and residential uses, in addition to A1 shops in Havant town centre, as recommended in the 2012 *South Hampshire Strategy* (Section 3) and *Beyond Retail* (Section 4).
- Combine the above approach with public realm improvements to public space (including better signposting and provision of outdoor space, cafes and other seating areas). This could be planned as part of comprehensive development, as is currently being progressed in Market Parade. It should also adopt a consistent design style that incorporates local heritage and builds in a sense of a 'market town'.
- Consider the requirements of businesses to ensure that policies work to meet their floor space demands in terms of size and configuration, and that the town centres meets these requirements.
- Encourage uses in Havant town centre (particularly the east side) that offer maximum viability for future investors and that increase local footfall and spending.

# 6. Havant Borough Local Plan

## Retail Policies

- 6.1 The Havant Borough Local Plan consists of the Havant Borough Local Plan (Allocations), adopted in July 2014 and the Havant Borough Local Plan (Core Strategy), adopted in March 2011. Policies within the Core Strategy that have an impact on retail development are summarised below.
- 6.2 Policy CS4 (alongside Policy CS17: Concentration and Distribution of Development within the Urban Areas) seeks to focus retail development primarily on Havant and Waterlooville town centres, particularly within the primary shopping areas, which is the approach recommended by the National Planning Policy Framework (NPPF). Retail developments should next be focussed on the four district centres (Cowplain, Emsworth, Leigh Park and Mengham/Gable Head) and then the ten local centres. The policy recognises the need specified in the NPPF and National Planning Policy Guidance for a sequential approach to site selection as a test for applications for main town centre uses outside of existing centres.
- 6.3 Policy CS6: Regeneration of the Borough aims to encourage development in Havant which has a comprehensive approach to economic, social and physical regeneration, in particular in Market Parade, at Havant railway station and in areas where it would improve links between Solent Road and West Street and to and from the Civic Offices and Public Service Village.
- 6.4 Policy DM19 of the Local Plan (Allocations) includes a sequential test which prioritises locations closest to town, district and local centres for small local shops of less than 150 sq .m. Policy AL3 includes a concentration test for applications for new non-A1 uses within primary and secondary shopping frontages. The next section considers how effective Policy AL3 has been at maintaining town centre vitality.
- 6.5 Other relevant Core Strategy policies which still have a bearing on future development of all types within both Havant town centre and the rest of the Borough include Policy CS8: Community Safety and Policy CS16: High Quality Design.



# 7. Havant Borough Local Plan (Allocations) Policy AL3

- 7.1 The wording of Policy AL3 of the Havant Borough Local Plan (Allocations) has been reproduced below.

Policy AL3: Town, District and Local Centres

Planning permission will be granted for development proposals that:

1. Provide main town centre uses in the town, district and local centres as defined on the Policies Map, and so contribute to their vitality and viability.
2. Promote and enhance the primary shopping areas of the town and district centres.
3. Retain at least 50% of the units in an unbroken run of primary frontage as defined on the Policies Map in retail (A1) use.
4. Retain at least 25% of the units in an unbroken run of secondary frontage as defined on the Policies Map in retail (A1) use.
5. Generate pedestrian activity within the primary shopping area by being open during the day to visiting members of the public.
6. Provide a shopfront within the primary shopping area with a well designed and appropriate display window.

Exceptions to parts (3) and (4) may be made to allow a change of use to non-retail if more than 25% of units in the unbroken run of frontage are vacant at the time of the application.

- 7.2 Planning applications for change of use from A1 uses within the Borough's shopping frontages since March 2011 (the date of adoption of the Core Strategy) were considered to test the effectiveness of Policy AL3 at retaining a good proportion of A1 uses and maintaining vital and viable town centres. By looking at the reasons for determination of these applications it was possible to assess whether the A1 concentration tests in clauses 3 and 4 of policy AL3 could be holding back potential non A1 uses from occupying vacant units in the town and district centres<sup>15</sup>.
- 7.3 There were 48 applications determined for change of use from A1 between March 2011 and June 2015, ten of which were prior approval applications (where prior notification was given for the change of use, which was classed as permitted development<sup>16</sup>). Excluding the prior approval applications, 10 were for change of use from an A1 retail unit located within a shopping frontage. All of these applications were granted permission.
- 7.4 The non-A1 uses permitted included estate agents, takeaways, adult gaming centres and one residential flat. Permissions were mainly for sites within secondary frontages although three were in primary frontages. The NPPF defines primary shopping frontages specifically as containing '*a high proportion of retail uses, which may include food, drinks, clothing and household goods*' (p55). These are all A1 uses; however in the eight cases where the previous use was vacant the case

<sup>15</sup> For applications within retail frontages which were determined prior to July 2014, saved Local Plan policies TC6 and TC7 were used to assess whether a change of use would have a detrimental impact on the retail function of the frontage. These policies were replaced by policy AL3.

<sup>16</sup> Under SI 564, class IA allows class A1 shops and A2 uses up to 150 sq.m to be converted to residential use (C3) subject to prior approval and to certain provisions.

officer determining the applications considered the reoccupation of a vacant unit with a non-A1 or part non-A1 use to improve the street's vitality and to be preferable to leaving the unit vacant. There is also the possibility that these units could be converted back to an A1 use in future.

- 7.5 For all change of use applications determined, the loss of A1 would not have brought the remaining proportion of A1 uses in the frontage below the threshold in the policy<sup>17</sup>.
- 7.6 Policy AL3 therefore appears to be operating reasonably successfully at present as it is helping to reduce vacancies by encouraging other uses, whilst still maintaining a good A1 representation. It may however be worth revising the policy in future if it is considered that a threshold adjustment could help to maintain more vibrant town and district centres, taking into account the value of leisure and other non-retail uses highlighted in Section 5. Lowering the threshold for vacancies in the exception test within the policy could benefit the centres' performance by allowing flexibility for any long-standing vacant units to change use. At the same time it may be sensible to maintain a lower limit on the proportion of non-A1 uses, particularly in the primary shopping frontages where the NPPF advises that traditional A1 uses should be focussed.

### **Local Plan (Allocations) policy AL3: Key findings**

- Policy AL3 of the Local Plan (Allocations), which protects against loss of A1 units in a primary or secondary frontage unless more than 25% of units in an unbroken frontage are vacant, appears to be successfully helping to reduce vacancies whilst maintaining a reasonable proportion of A1 units. This will need continuous monitoring to ensure that the town centre remains vital.

### **Recommendations:**

- Maintain the existing frontages and the A1 concentration tests in policy AL3 of the Local Plan (Allocations) for primary and secondary frontages.
- Continue to monitor reasons for refusing applications to ensure criteria 3 and 4 of policy AL3 continue to allow changes of use to non-A1 uses where appropriate; and that they prevent loss of too many active A1 uses.
- Consider adjusting either the proportion of A1 units or vacancy threshold within Policy AL3 as part of a future Local Plan review if necessary to maintain vital and viable town centres.

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<sup>17</sup> Policy AL3, or saved policies TC6/TC7 of the 2005 Local Plan.

# 8. Havant Borough Retail Floor Space Target

- 8.1 Retail floorspace targets have become increasingly less relevant to the economic success of town centres given the importance of adapting to wider UK market shopping trends, as outlined in sections 4 and 5, which indicate the need to move away from traditional comparison uses in small footprint stores towards centres with larger footprint stores to enable them to compete more effectively with larger centres and a mix of leisure and community uses, public outdoor space, restaurants and other evening and night-time economy uses. The total comparison retail development in Havant and Waterlooville has nevertheless been compared in this section to the Borough-wide floorspace target, as it provides some context and an indicator of the town centres' past performance.
- 8.2 Policy CS4 of the Havant Borough Local Plan (Core Strategy), informed by the NLP Retail and Leisure Study (Nathaniel Lichfield and Partners, 2009), projected a net requirement of 13,000 sq. m of new comparison retail floor space within Havant's town and district centres up to 2026. This is to be split between Havant Town Centre (9,000 sq. m.) and Waterlooville (4,000 sq. m.).
- 8.3 Table 2 shows floorspace completed compared to the policy CS4 target. The figures include total retail floor space built or lost since 2006 and are combined with commitments, i.e. developments under construction, as of April 2015:

	East		West	
	Convenience	Comparison	Convenience	Comparison
<b>Totals, including commitments</b>	<b>8,193</b>	<b>23,034</b>	<b>4,012</b>	<b>3,077</b>
<b>Policy CS4 target 2006-2016</b>		<b>9,000</b>		<b>4,000</b>
<b>Remaining requirement / Sq. m. floorspace above target</b>		<b>-14,034</b>		<b>923</b>

Table 1: Net retail provision in Havant Borough as of April 2015 (sq. m.)

- 8.4 Taking into account units planned or under construction as of April 2015, the 2009 based projection for comparison retail floor space in Havant town centre to 2026 will be exceeded by 14,034 sq. m, whilst there would only be a remaining requirement for 923 sq. m. in Waterlooville. This is a very positive indicator of how successful Havant in particular has been, as the market has delivered significantly more floorspace than was envisaged in 2009 during a period of national recession.
- 8.5 As of publication, a major development of 7,617 sq. m. of A1 retail floor space was under construction between Solent Road, Brockhampton Lane and Selbourne Road (application no. APP/14/00862). This is set to be occupied by two multinational retailers, Marks & Spencer and Next. It is anticipated that these new units will further raise Havant's profile and increase its market share of expenditure generated from within the Borough. A four storey Premier Inn hotel and restaurant has also recently been completed at the entrance to Langstone Technology Park. Developers have also shown interest in comprehensively redeveloping an area of Market Parade.

8.6 Development of new retail outlets is one way in which Havant and Waterlooville town centres have increased their overall market share and allowed them to compete more successfully with other town centres. However this is not a strategy for economic success in itself. As seen in sections 2 and 4, the National Planning Policy Guidance and *Beyond Retail* both point towards shops forming only part of the plan for regenerating town centres and advise incorporating other uses as well including daytime, evening and night time uses. Section 10 considers the economic health of Havant's present retail offer. The paper makes recommendations for Havant town centre in sections 10-12; and for Waterlooville town centre in sections 14-16.

#### **Retail floorspace targets: Key findings**

- Comparison retail floor space development in the east of the Borough, including Havant town centre, since 2006 exceeded the 2009-based target in the Local Plan by 6,417 sq. m.
- Taking into account units planned or under construction as of April 2015, the comparison retail floor space target in policy CS4 has been exceeded by 14,034 sq. m. This includes 7617 sq. m. of A1 floor space under construction on Solent Road (Marks & Spencer/Next).
- Havant Town Centre retailing is overall very successful – the market has delivered significantly more floorspace than was envisaged in 2009 during a period of national recession.

# 9. Havant Town Centre: Retail Overview

- 9.1 Havant is a compact former market town, which has evolved around the crossroads formed by West Street, South Street, East Street and North Street. Havant performs the role of a medium-sized town centre within the hierarchy of settlements across the PUSH sub region (as described in section 3). The centre is easily accessible in terms of its central location and excellent motorway and rail links and it benefits from the presence of a range of multiple and independent retailers – section 10 provides a categorised breakdown of these uses.
- 9.2 Havant's primary shopping frontages are in West Street, the southern end of North Street, the Meridian Centre and at the Central and Solent Retail Parks, which were completed in 2008. The presence of retail parks within a town centre is unusual and places Havant in a unique position in regard to the type and size of retail units that it can attract and successfully retain. Also situated within the town centre boundary is a Tesco Superstore in Solent Road. Waitrose occupies a large store in North Street whilst three of the remaining key attractors – Wilkinsons, Argos and WHSmith – are located in the Meridian Centre. Further retail floor space is presently under construction on land at Solent Road to the west of the Solent Retail Park (see section 8). Figure 3 indicates the general location of Havant town centre's key shopping areas in relation to each other:

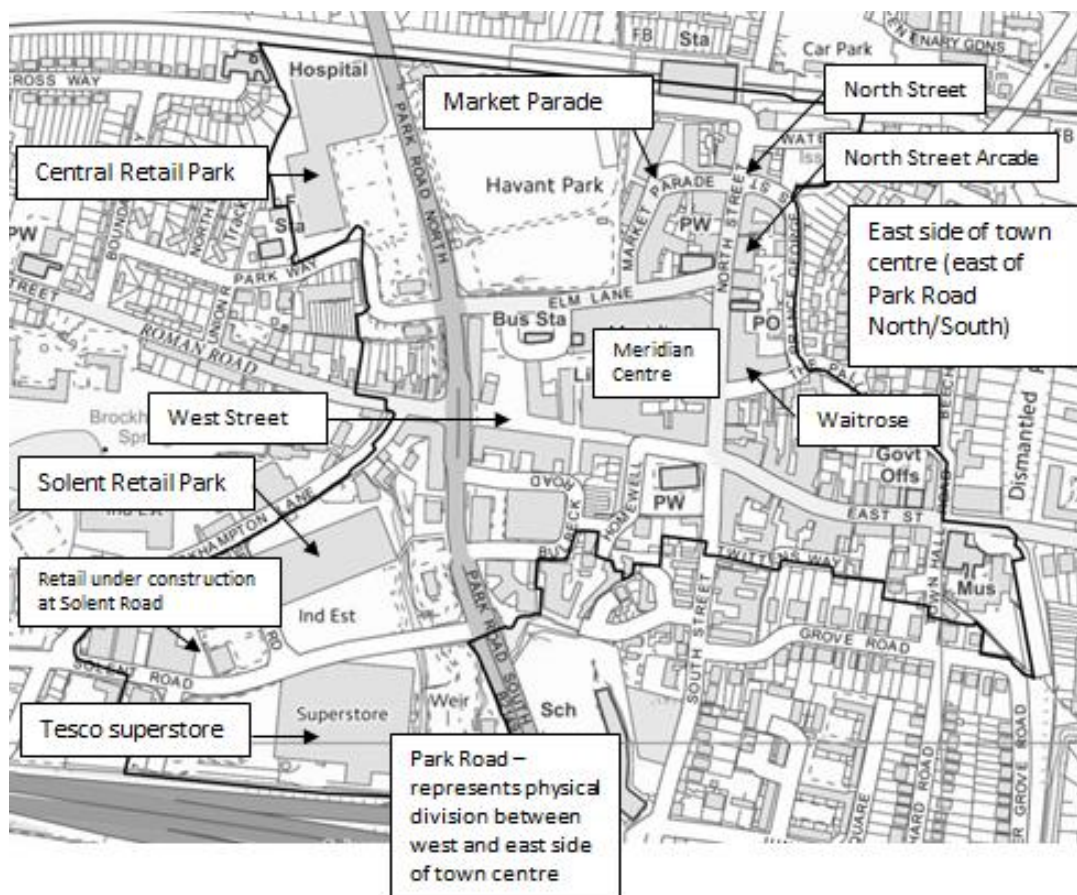


Figure 3: Havant's key shopping areas

9.3 Park Road represents a physical division between the west and east sides of the town centre, with the retail parks situated towards the westernmost edge. Despite their proximity to each other the two sides do not compete for trade as each attracts complementary markets; the retail parks house larger retail units selling clothing and bulky goods whereas the eastern side of the centre caters for a greater proportion of independent shops and services including banks and building societies, restaurants and cafes as well as traditional high street shops. There is an open street market held twice a week on Tuesdays and Saturdays just outside the entrance to the Meridian Centre in West Street, which attracts significant numbers of shoppers and creates a vibrant and bustling atmosphere.

9.4 A brief summary of Havant's key shopping areas is provided in the table below:

<b>Area</b>	<b>Retail mix</b>
Meridian Centre	Purpose-built enclosed shopping centre (opened 1991) including decked parking above first floor and an adjacent multi-storey car park in Bulbeck Road. Centre houses multiple and independent (mainly comparison) retailers, as well as a café. Havant library is located on the first floor.
North Street	Mainly A1 uses with some A2 uses in the primary frontage; broader mix of units to the northern end including restaurants and cafés.
North Street Arcade	Pedestrianised precinct adjoining North Street. Mixture of comparison retail and services and one takeaway.
West Street	Predominantly shops and other A1 uses; also banks and building societies, estate/travel agents and cafés.
Market Parade	Cafes, takeaways and one restaurant as well as services and traditional A1 uses. Mainly independent retailers.
Solent Road/Retail Park	Tesco Extra superstore; Large retail units housing major brand multiple stores including Next, Laura Ashley, Pets at Home, Hobbycraft, Halford, Peacocks and Sports Direct. Currently being extended to include a M&S store.
Central Retail Park	Large retail units including Wickes, Aldi, Dreams and Carpetright.

Table 2: Summary of Havant's key shopping areas

## The Meridian Centre

9.5 The Meridian Centre's occupancy has increased significantly in the last few years to the extent that the centre is now fully occupied at ground floor level, primarily by A1 uses (18 out of 20 units). Some of the businesses represented include WHSmith, Store Twenty One, Holland & Barratt, Wilkinsons, Argos, O2 and Costa Coffee. Four out of the 11 units on the first floor were however vacant at the time of the latest survey in March 2015, two of which had been last occupied by comparison retail businesses (Sleepwell and Simpsons).





**Photo 1: Outside the Meridian Centre**

- 9.6 The Meridian Centre has recently (2014) been taken over by Fairacre Asset Management. It is understood that there is an intention to undertake some physical enhancements to the building and to seek a new mix of tenants. First floor occupancy remains a challenge and may warrant considering an alternative, non-retail approach, for example a new leisure use such as a cinema or a gym, subject to a suitable and viable scheme coming forward.

## **Market Parade**

- 9.7 Market Parade is a key gateway site into the older historic part of the town centre. It would be desirable for Havant town centre's economy for its profile to be raised and improved, both as a result of new retail uses and potentially also through new signposting and other public realm improvements.



**Photo 2: Market Parade**

- 9.8 Most of the units in Market Parade are A1 authorised uses and most are within secondary frontages however there are also several other uses including restaurants and cafes. Market Parade has a high overall vacancy rate at present, in part due to progression of a scheme at nos. 35-49 (pictured to the left hand side of the photo). Previous tenants left to make way for the potential comprehensive redevelopment of this entire block.

## North Street Arcade

- 9.9 North Street Arcade has a generally healthy occupancy rate with only two vacancies recorded as of March 2015; however one of these, no. 1 North Street Arcade, has been vacant since January 2014 and is in a prominent location at the arcade's entrance.



Photo 3: North Street Arcade

- 9.10 Permission was granted for the large corner unit to change use to a high quality restaurant in early 2015 and this opened in February 2016. The reoccupation of this unit for commercial use will improve the arcade's appearance and the vitality of this northern part of the town centre. It will also provide a further boost to the town centre's evening economy and tie in well with the nearby proposed development at numbers 35-49 Market Parade and other public realm ideas presently being considered.



# 10. Havant Town Centre: Health Check

10.1 The National Planning Practice Guidance (NPPG) recommends ten performance indicators for local planning authorities to use to assess the economic health of town centres. These are:

- Diversity of uses
- Proportion of vacant street level property
- Commercial yields on non-domestic property
- Customers' views and behaviour
- Retailer representation and intentions to change representation
- Commercial rents
- Pedestrian flows
- Accessibility
- Perception of safety and occurrence of crime
- State of town centre environmental quality

10.2 This section of the report considers Havant town centre in relation to the majority of the above indicators. Public realm and accessibility are considered but will be addressed to a greater degree by other parts of the *Transforming Havant Town Centre* project.

## Diversity of Uses

10.3 Havant town centre is fairly compact and has a wide range of shops and several important anchor stores, including a Waitrose store in North Street and a Tesco superstore in Solent Road (part of the new enlarged town centre boundary). There is a Boots, Clarks, New Look and Superdrug in West Street and Argos, Wilkinsons and WHSmith stores in the Meridian Centre. There are also many important independent retailers and cafes as part of the town centre offer.

10.4 Figure 4 illustrates the number of units across Havant town centre that fall into different land use categories (use classes). These are also illustrated in the map of the centre's use classes at Appendix 1:

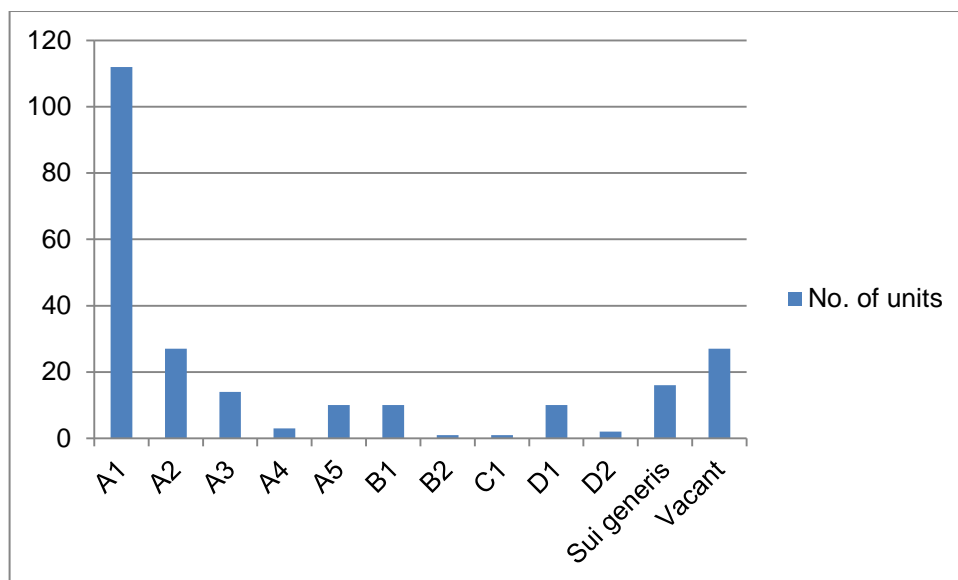


Figure 4: Use classes within Havant Town Centre as of March 2015

10.5 Table 3 and Figures 5 and 6 indicate the proportion of retail sector units and floorspace in Havant town centre and compare these to UK average figures. Havant appears very close to the UK averages across all trade categories with slight underrepresentation in comparison retail and catering (restaurants, cafes, pubs and takeaways) (both around 3% below) and slight overrepresentation in services and other categories, based on unit numbers. In contrast, total comparison floorspace in Havant town centre is 0.7% above the UK average. Havant town centre has a considerable quantity of comparison A1 floor space within its two retail parks and this makes a noticeable difference to the proportions in this trade category. The proportion of vacant retail floorspace is equal to the UK average.

Sector	Units (count)	Units (%)	UK average (%)	Floorspace (sqm)	Floorspace (%)	UK average (%)
Convenience	14	7.4	8.81	8,870	18.3	17.79
Comparison	74	38.9	40.91	22,750	46.9	46.02
Catering	26	13.7	16.39	3,760	7.7	11.79
Services - A2	21	11.1	8.68	3,470	7.1	7.06
Services - Other	24	12.6	11.45	2,760	5.7	5.61
Other	7	3.7	1.16	2,080	4.3	1.03
Vacant	24	12.6	12.6	4,860	10.0	10.7
TOTAL	190	100	100	48,550	100	100

Table 3: Percentage and floorspace in retail sector<sup>18</sup> categories in Havant town centre – March 2015

Source: Unit count from HBC survey (March 2015); Floorspace from Experian Goad (2015). UK averages from Experian Goad data (2014)<sup>19</sup>

<sup>18</sup> Use classes A1-A5

<sup>19</sup> Note: Vacant units recorded separately to allow comparison of sectors with UK averages.

NOTES:	
Sector	Types of unit included
Convenience	Food shops - butchers, bakers, fruit & veg, fish, supermarkets.
Comparison	Clothing, chemists, furniture, DIY, Books/news, electrical, jewellery.
Catering	Restaurants, cafes, takeaways, pubs.
Services – A2	Banks and building societies, finance, insurance, estate agents.
Services - Other	Repairers, taxi, travel agents, hairdressing, funeral, dry cleaning.
Other	Employment services, careers.

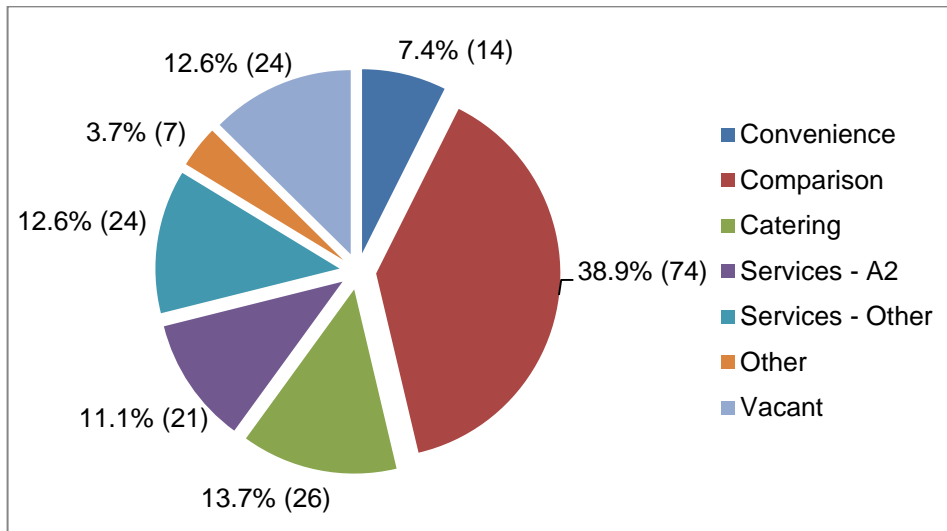


Figure 5: Percentage of units\* in retail categories, Havant Town Centre – March 2015

\*N.B. unit counts shown in brackets after percentages

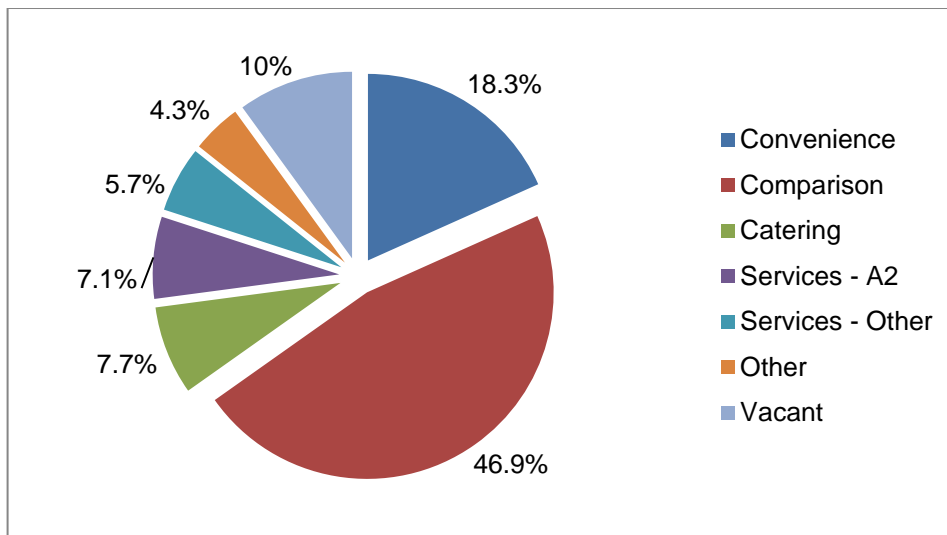


Figure 6: Percentage of floorspace in retail categories, Havant Town Centre – March 2015

10.6 The maps at Appendices 1 and 2 illustrate the proportion of use classes across Havant town centre in March 2015 and February 2005. By comparing the maps it is possible to see some distinct changes. Several units previously occupied by a mixed range of uses at the eastern end of East Street including shops and offices have been converted into residential use. This trend has occurred naturally following a decision to enable flexibility and opportunity in the market by removing the tertiary frontage in Policy TC8 of the 2005 Havant Borough District Wide Local Plan when it was superseded by the Local Plan (Allocations) in 2014. The remaining units in East Street are mostly in A2 use although there are also a few A1 shops and a café. There have also been some losses of

retail and other uses to residential in other parts of the town centre between the two years but the vast majority of ground floor uses have remained non-residential.

- 10.7 The number of A3, A4 and A5 food and drink uses in the town centre decreased slightly between 2005 and 2015 from 35 to 29 units (one of which was vacant in 2015). Nearly half of these food and drink uses have remained clustered at the top end of North Street and in Market Parade, possibly due to the bus and rail stations being situated nearby, and between 2005 and 2015 their number has remained almost exactly the same (a fall from 14 to 13 units)<sup>20</sup>.
- 10.8 There has been a reduction in the number of pubs in the town centre in the last five to ten years, with the closure of The Cobden Arms (74-76 West Street) in 2009<sup>21</sup>, The Star (59 North Street) in 2011, The Perseverance (51 North Street) in 2012, and the grade II listed White Hart (1 East Street) in 2014. The White Hart remains currently vacant whilst The Perseverance has changed its use to a restaurant. The Star was demolished in 2014 and the site has permission as a temporary car park until a new use for it is determined.
- 10.9 Monitoring data from the last few years shows a slight rise in the number of discount shops such as Poundland and Pound World within the A1 shops category. This reflects a national trend for a strong performance of discount stores, charity shops and budget supermarkets, which is the partially the result of discounters broadening their range of goods as well shoppers seeking value, particularly during the recession era<sup>22</sup>.

## Diversity of Uses – A1 Representation

- 10.10 In March 2015 there were 131 commercial A1 units in the town centre, of which 112 (85.4%) were occupied. This represents 54% of all occupied units. Table 3 below illustrates the change in A1 representation in the town centre between 2005 and 2015. The total of A1 units has remained roughly similar. This was mainly due to a local policy change: In July 2014 the Havant Borough Local Plan (Allocations) amended the boundary of the town centre to include the Central and Solent retail parks. These were completed in 2008 and comprise a 100% proportion of A1 uses.

	2005	<i>Town centre boundary amended July 2014 in Local Plan (Allocations)</i>	2015 (figures in brackets indicate total A1 units using the former boundary, i.e. excluding retail parks)
<b>Total A1 units</b>	136		131 (117)
<b>Total occupied A1 units</b>	*		112 (98)
<b>Vacant A1 units</b>	*		19 (19)

**Table 4: A1 representation within Havant town centre boundary, 2005-2015**

\*Units are not shown here as vacancy data for 2005 was unavailable

- 10.11 From observation of the use class maps in Appendices 1 and 2 one can easily discern the significant increase in total A1 floor space between 2005 and 2015. The retail parks contain 'warehouse' type comparison stores with a large footprint which contribute a considerable quantity of actively trading A1 floor space, as do the larger A1 stores in North Street and the Meridian Centre such as Waitrose and Store Twenty One (which are recorded as single units, despite their

<sup>20</sup> Note that there are differences between the uses shown on the keys on the maps in Appendices 1 and 2 – this is because in April 2005 the former Use Class A3 (food and drink) was disaggregated into three separate Use Classes – A3 (Restaurants and cafes), A4 (Drinking establishments) and A5 (Hot food takeaways).

<sup>21</sup> Planning permission was granted for a change of use of this building to flats in July 2015.

<sup>22</sup> *Beyond Retail: Redefining the Shape and Purpose of Town Centres*, Distressed Town Centre Property Taskforce (2013)

comparatively large size). This presents a positive overall picture of Havant's current retail provision.

10.12 Figure 7 below illustrates changes in the number of A1 uses in the town centres' primary frontages over time. The number of A1 uses fell between 2005 and 2011 but increased sharply as the result of the inclusion in 2014 of 13 A1 units within a new primary frontage at Central and Solent Road retail parks<sup>23</sup>. These units are new since 2005 and their inclusion in the town centre as part of the boundary review in 2014 reflects their contribution to attracting visitors to the area. The retail parks will continue to be assessed as part of monitoring town centre use classes and occupancy rates.

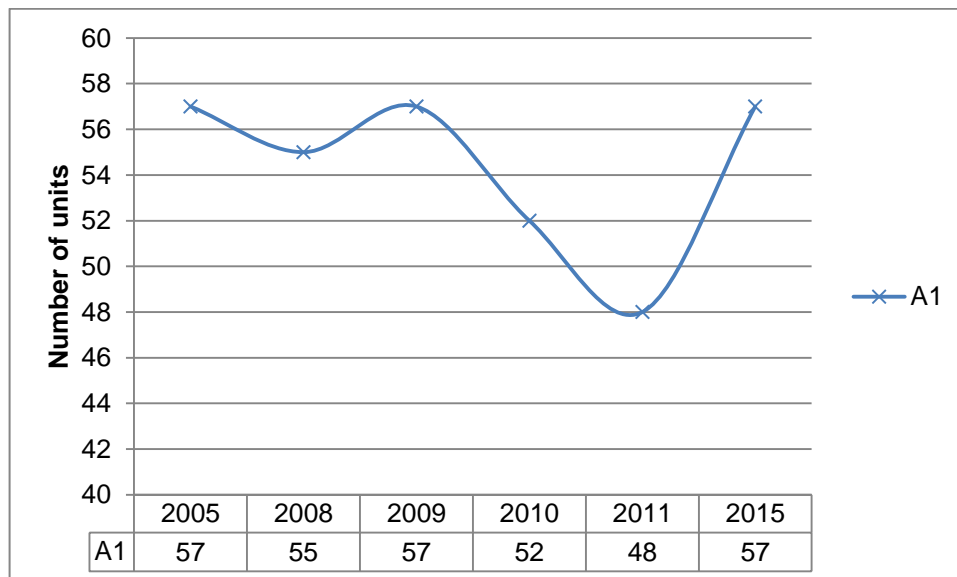


Figure 7: A1 uses in Havant town centre's primary frontages 2005-2015 (numbers, including vacant units)

10.13 Figure 8 below illustrates some fluctuation in the total number of A1 uses in the secondary frontages between 2005 and 2010 but a steep drop of 20 units between 2011 and 2015. Half of this reduction was due to 11 units in North Street, North Street Arcade and Market Parade being removed from secondary frontage designation in the Local Plan (Allocations) in 2014, with the other half of the reduction accounted for by permitted changes of use – For more information, see section 7.

<sup>23</sup> by the Local Plan (Allocations).

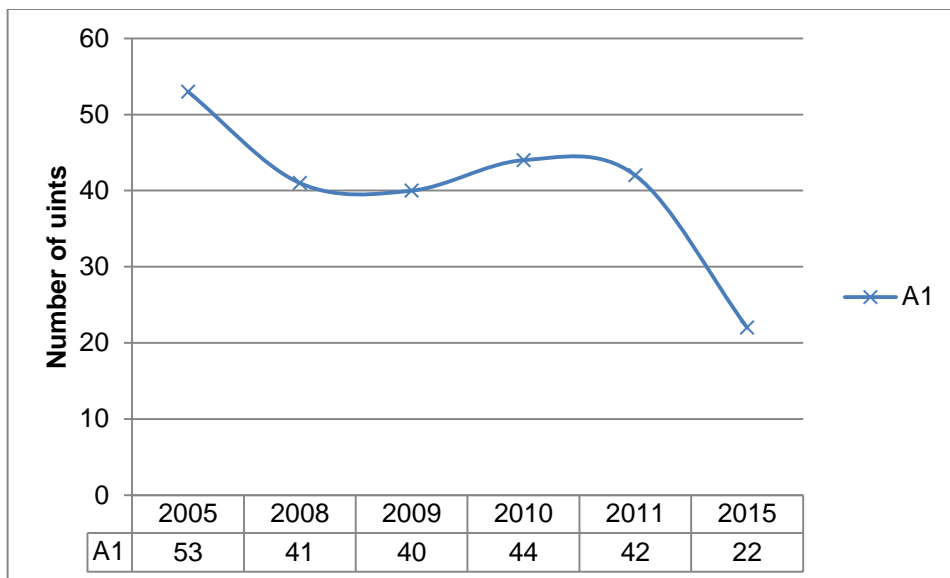


Figure 8: A1 uses in Havant town centre's secondary frontages 2005-2015 (numbers, including vacant units)

### Diversity of uses – key findings:

- A1 floor space within the town centre has significantly increased as a result of the town centre boundary review in 2014 whilst numbers of A1 units have remained fairly similar since 2005.
- Several changes of use from retail and offices to residential uses in East Street between 2005 and 2015, partially enabled by change to frontages in Local Plan (Allocations) in 2014. A few retail losses in other parts of the town centre.
- Slight decrease in food and drink uses in the town centre between 2005 and 2015. Most food and drink uses remain clustered at top end of North Street and in Market Parade.
- Reduction in number of pubs in town centre in the last five to ten years.
- Slight increased number of charity and discount shops in the town centre, reflecting the broadened range of goods sold at these shops and shoppers seeking value. There has been a national trend for a strong performance of discount stores, charity shops and budget supermarkets as other multiples across the UK have shifted from smaller and medium-sized town centres to larger town centres. However the trend is also partially the result of discounters broadening their range of goods and shoppers seeking greater value.
- Total A1 units across town centre remained similar between 2005 and 2015 but overall A1 floor space increased as result of retail parks completed in 2008.
- Fall in number and proportion of A1 units in secondary frontages between 2011 and 2015. Part of this reduction was due to changes to the secondary frontages in 2014 with the other part accounted for by permitted changes of use.

# Proportion of Street-level Vacancies

10.14 Figure 9 shows the change in the percentage of vacant ground floor level retail units in Havant town centre between 2009 and 2015.

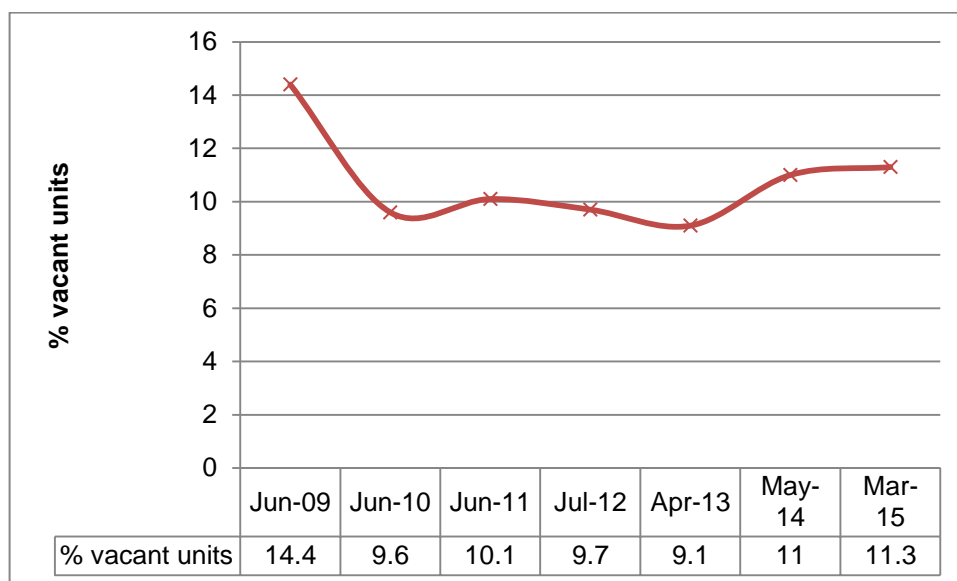


Figure 9: Retail vacancies in Havant town centre 2009-2015

10.15 The proportion of vacancies in Havant town centre fell dramatically between June 2009 and June 2010, between 14.4% and 9.6%. This was likely to be due to increased shopper numbers following the peak of the recession as vacancies in the Borough's other centres also fell during this period.

10.16 In March 2015 there were 233 commercial units in the town centre, of which 212 (88.4%) were occupied. The national average vacancy rate for town centres across England in July 2015 was 11.6% (The Local Data Company<sup>24</sup>). The vacancy rate for Havant town centre as a whole in October 2015 was precisely equal to this at 11.6%<sup>25</sup>.

10.17 Data from the local authority's own retail surveys shows an increase in the proportion of occupied units in the town centre in the last two years in spite of the wider economic trend showing a downturn in town centre retail occupancy nationally. This is a positive indication for Havant town centre's economic performance and shows that it is continuing to perform well and improve. The positive upward trend in occupancy is likely to continue as town centre regeneration initiatives start to take effect, particularly in and around Market Parade. Market Parade has an artificially high overall vacancy rate at present which is the result of the recent purchase of unit nos. 35-49 by a developer in advance of a comprehensive scheme to be built.

10.18 Table 5 shows the percentage of units for each unbroken run of frontage within Havant town centre that are presently vacant. The frontage runs were established by using the Local Plan Proposals Map which shows unit numbers. As per policy AL3, the frontages include minor breaks in the building line, such as alleyways, but exclude substantial breaks, i.e. road junctions and crossroads.

<sup>24</sup> [http://www.theretailbulletin.com/news/uk\\_shop\\_vacancy\\_remains\\_at\\_1\\_in\\_july\\_07-08-15/](http://www.theretailbulletin.com/news/uk_shop_vacancy_remains_at_1_in_july_07-08-15/)

<sup>25</sup> Note that this vacancy rate includes all recorded commercial use classes within the town centre, including leisure and non-retail uses.

Primary(P)/Secondary(S)	Unbroken run	Addresses	Vacant units	% vacant
Primary	P1	Meridian Centre (ground floor)	0/20	0%
Primary	P2	2-22 North Street (even nos.)	0/10	0%
Primary	P3	5-23 North Street (odd nos.)	1/8	12.5%
Primary	P4	1 Park Road North 2-58 West Street (even nos.)	0/18	0%
Primary	P5	1-33 West Street (odd nos.)	1/20**	5%
Secondary	S1	1-33 Market Parade (odd nos.)	2/17*	11.8%
Secondary	S2	2-32 Market Parade (even nos.)	1/15	6.7%
Secondary	S3	35-49 Market Parade (odd nos.)	8/8	100% <sup>26</sup>

**Table 5: Percentage of vacant units in Havant town centre primary and secondary frontages, March 2015**

\*1/17 taking into account a unit that is due to be redeveloped imminently

\*\*0/20 taking into account a unit that is due to be redeveloped imminently

10.19 Notwithstanding the area of Market Parade (S3) which is set to be redeveloped, most other parts of the town centre that fall within a frontage designation have a very healthy occupancy rate (100% occupation in the case of primary frontages).

#### **Street-level vacancies – key findings:**

- Havant town centre retail vacancies below national average (based on current town centre boundary). A large proportion of these are accounted for by a proposed future development in Market Parade.
- Increase in proportion of occupied units in the town centre in the last two years in spite of wider economic trend showing a downturn in town centre retail occupancy nationally.
- Planned comprehensive scheme in Market Parade likely to reduce current high proportion of vacancies between nos. 35 and 49.

<sup>26</sup> The vacancy level in this part of Market Parade is high at present due to progression of a scheme at nos. 35-49 where previous tenants left to make way for a potential redevelopment. It does not directly reflect on the economic health of this particular area.



# Convenience and Comparison Goods Spending Patterns

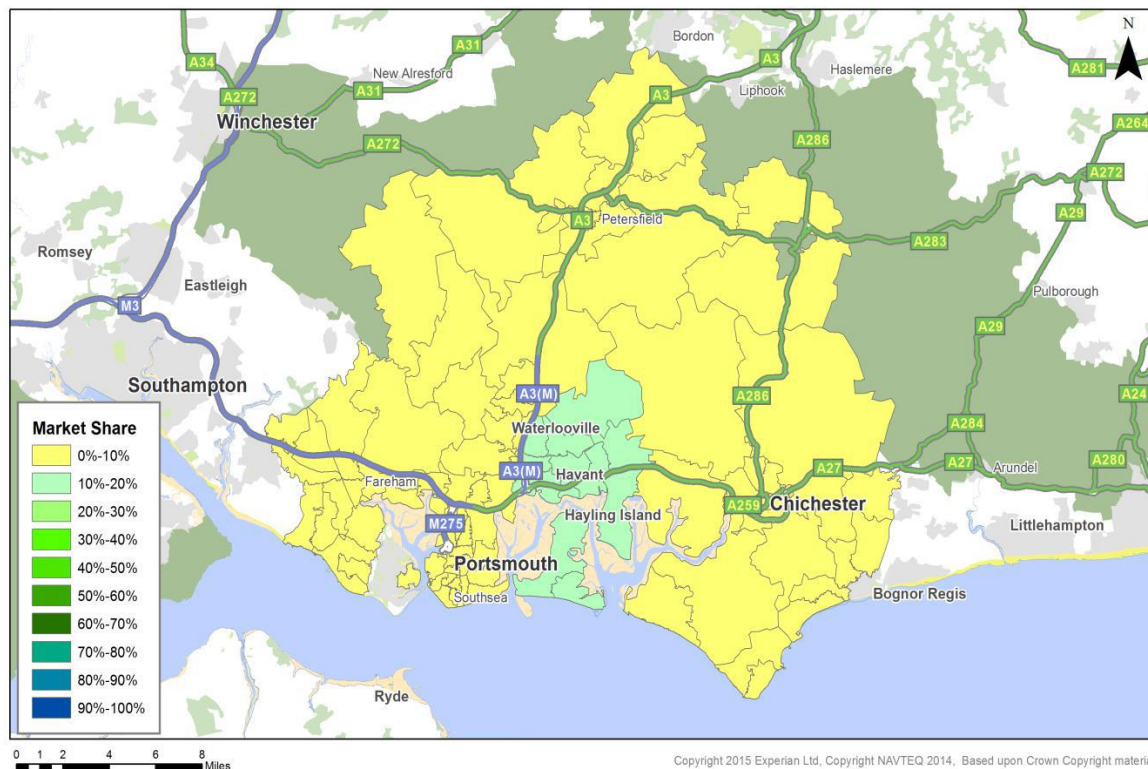


Figure 10: Retail catchment area for Havant town centre

10.20 The map at Figure 10 shows Havant’s market share for shopper expenditure within its total retail catchment area, with the light green and yellow shaded postcode sector areas representing the average percentage of residents of areas closest to Havant that shop in Havant town centre.

10.21 The total comparison goods expenditure within the entire catchment in 2014 was £114.8m<sup>27</sup>. This is indicated by Table 6 which also shows the breakdown of expenditure in other sector categories.

	Catchment spend (£'000s)	%	GB spend (£'000s)	%
Total comparison	114,879	46.5	196,900,541	45.5
Total convenience	67,353	27.3	118,690,524	27.4
Total leisure	64,698	26.2	117,342,878	27.1
Total expenditure	246,930	100.0	432,933,943	100.0

Table 6: Total shopper expenditure within Havant’s retail catchment (2014)

Source: Experian (2015)

10.22 Havant’s non-food market share, i.e. total comparison goods expenditure spent in Havant town centre as a proportion of its total retail catchment area is 5.2%<sup>28</sup>. This is slightly below Waterlooville’s non-food market share as a proportion of its catchment area (6.2%), despite Havant

<sup>27</sup> Source: Experian (2015).

N.B. The expenditure data provided by Experian for Havant for the 2015 Town Centre Shopper Report is lower than that used in the 2009 NLP Retail Study due to Experian using a smaller study/catchment area in 2015.

<sup>28</sup> Source: Where Britain Shops, 2014 (Experian Town Centre Shopper Report, November 2015)

having a slightly larger shopper population<sup>29</sup>. Both town centres have retail parks within their boundaries and immediate retail catchment areas.

10.23 Patterns of spending are also indicated by shopper and expenditure leakage to other centres. Key competitors for Havant and Waterlooville as one would expect are the larger medium-sized town centres of Fareham and Chichester; and Portsmouth City Centre, which is a regional city centre in the PUSH sub-regional hierarchy of centres in Figure 1 (section 3).

10.24 Havant's retail catchment experienced 20.3% leakage of comparison expenditure to central Portsmouth<sup>30</sup> in 2014 whilst Waterlooville experienced 20.9% leakage to central Portsmouth. Havant has a higher leakage of expenditure to Chichester and, in terms of total expenditure, retains a lesser proportion of comparison spending within its catchment shopper population than Waterlooville. These figures are illustrated in Tables 7 and 8. Note that the figures in Table 7 indicate leakage from Havant to other centres within its catchment area – leakage figures for Waterlooville are shown in Table 8.

Retail Centre	Leakage from Catchment			
	Shopper population	%	Shopper Expenditure (£)	%
Portsmouth - Central	131,225	20.3%	676,938,185	19.5%
Chichester	76,159	11.8%	433,364,006	12.5%
Fareham	57,494	8.9%	306,207,254	8.8%
Waterlooville	38,126	5.9%	208,417,926	6.0%
<b>Havant</b>	<b>33,747</b>	<b>5.2%</b>	<b>182,558,228</b>	<b>5.3%</b>
Portsmouth - Gunwharf Quays	28,857	4.5%	143,013,201	4.1%
Southampton Central	24,565	3.8%	132,424,689	3.8%
Gosport	19,051	2.9%	94,698,700	2.7%
Petersfield	18,152	2.8%	111,115,237	3.2%
Portsmouth - Ocean Park Retail Park	17,941	2.8%	92,661,707	2.7%
Other	202,123	31.2%	1,082,324,046	31.2%
<b>Total</b>	<b>647,440</b>	<b>100.0%</b>	<b>3,463,723,180</b>	<b>100.0%</b>

**Table 7: Key competitors for Havant**

Source: Experian (2015)

<sup>29</sup> 647,440, compared to 619,719

<sup>30</sup> Not including Gunwharf Quays

	Leakage from Catchment			
Retail Centre	Shopper population	%	Shopper Expenditure (£)	%
Portsmouth - Central	129,452	20.9%	666,906,084	20.1%
Chichester	55,320	8.9%	292,408,879	8.8%
Fareham	51,799	8.4%	298,602,373	9.0%
<b>Waterlooville</b>	<b>38,345</b>	<b>6.2%</b>	<b>209,892,876</b>	<b>6.3%</b>
Havant	32,740	5.3%	177,005,149	5.3%
Portsmouth - Gunwharf Quays	28,598	4.6%	141,432,180	4.3%
Southampton Central	24,194	3.9%	130,661,579	3.9%
Gosport	23,016	3.7%	139,729,237	4.2%
Petersfield	18,852	3.0%	93,406,115	2.8%
Portsmouth - Ocean Park Retail Park	17,675	2.9%	91,138,891	2.7%
Other	199,728	32.2%	1,076,966,139	32.5%
<b>Total</b>	<b>619,719</b>	<b>100.0%</b>	<b>3,318,149,503</b>	<b>100.0%</b>

Table 8: Key competitors for Waterlooville

Source: Experian (2015)

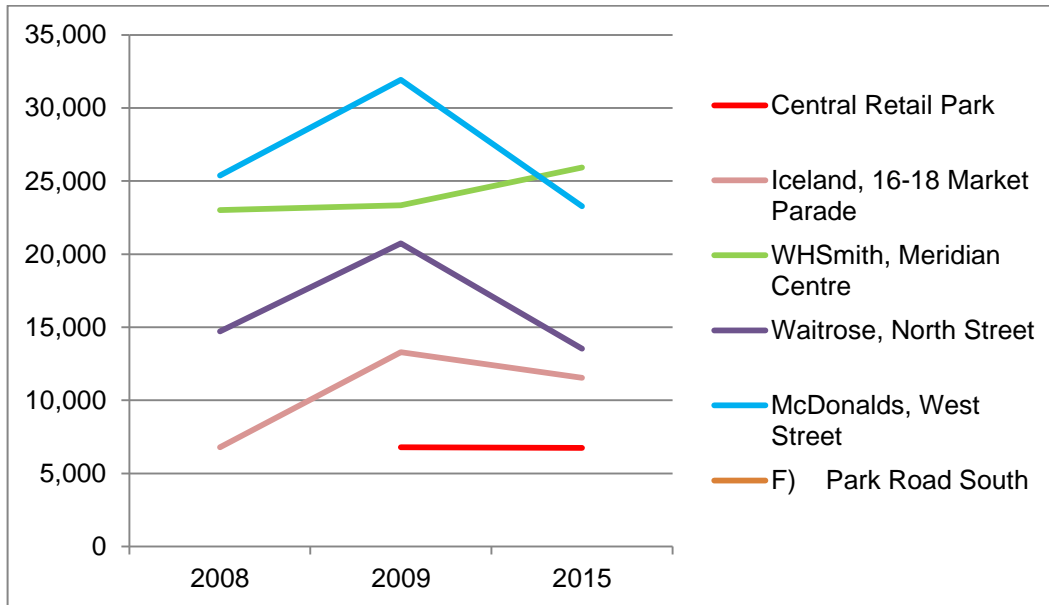
## Rents

- 10.25 The latest available data for commercial rents in Havant are in the 2009 Town Centres, Retail and Leisure Study by Nathaniel Lichfield and Partners (in Table 4.2). This is now a few years old but showed that Havant town centre had experienced growth in Zone A prime retail rents between 2002 and 2007, following a long period of static rents between 1997 and 2002.

## Pedestrian Flows

- 10.26 Monitoring pedestrian footfall is a key method of recording evidence of shopping centre vitality that can be used to help assess the impact of future development proposals and justify planning decisions on them as well as in adjusting the Council's existing retail policies and shopping frontages. This will be important for implementing new retail policies as part of any future Local Plan review. It is vital to continue to monitor footfall on a regular basis in the town centres to enable analysis of on-going trends which may be affected by new stores or store closures or by new or amended planning policies or other positive interventions, for example public realm improvements.
- 10.27 Havant town centre has a rare advantage by having two retail parks within its boundary as it can attract a greater range and number of visitors than might be the case if they were located outside and further from the town centre. It also enables their further development or expansion under NPPF sequential test guidance. It will be particularly useful to monitor the impacts of any environmental, transport, parking or other improvements on pedestrian footfall between various areas of the town centre, in particular between east and west. The east and west sides of the town centre are physically segregated by a pedestrian crossing and traffic lights in Park Road North/South, which is a challenge for maintaining and improving linked trips on foot.

10.28 The results of the pedestrian footfall surveys are presented below. In addition to 2015, manual footfall counts were previously undertaken throughout Havant town centre in 2008 and 2009. Figure 9 shows the total weekly pedestrian footfall recorded at six stations (count points), together with the results of these surveys. The figures in the table represent total footfall over an entire week between 10am and 4.30pm<sup>31</sup>.



Footfall station	2008	2009	2015	Commentary
A) Central Retail Park	-	6797	6744	0.1% change
B) Iceland, 16-18 Market Parade	6797	13300	11534	13% fall from 2009 but 41% increase from 2008
C) WHSmith, Meridian Centre	23014	23335	25930	10% increase from 2009
D) Waitrose, North Street	14718	20739	13541	34% fall from 2009 but only 8% from 2008
E) McDonalds, West Street	25368	31925	23281	27% decrease from 2009 but only 7% from 2008
F) Park Road South	-	-	15066	
Footfall total for stations B) to E)	69,897	89,298	74,286	17% fall from 2009 but 6% increase from 2008

Figure 11: Total weekly footfall in Havant town centre, 2008-2015

- Dashes represent where there was no previous survey data.

\* Park Road South was only surveyed in March 2015, hence no line shown.

10.29 The lowest pedestrian flows for both 2009 and 2015 were recorded at Central Retail Park (pedestrian crossing over Park Road North). Footfall at this station was almost unchanged between 2009 and 2015. Both retail parks appear to be trading well from unit occupancy levels and observation of visitor numbers and cars parked, although footfall between the older east side of the town centre and Solent Retail Park is far stronger than between the east side of the town centre and Central Retail Park. This would suggest that Solent Retail Park and the traditional town centre

<sup>31</sup>Data was obtained at each footfall station over two days and then a standard multiplier was used to convert it into a total weekly equivalent number (WEN).

experience some linked shopping trips on foot whereas Central Retail Park operates more independently from the traditional town centre.

- 10.30 This difference in shopping patterns could reflect the different retail offers at the two retail parks. Solent Retail Park is similar to the traditional town centre to the east of Park Road as it has a high proportion of major brand clothing stores (Next, Peacocks, Laura Ashley, as well as Sports Direct), than at Central Retail Park, where dominant retail units include DIY (Wickes, Carpetright), bedroom furniture sales (Dreams) and an Aldi supermarket, which are more typical edge of centre uses.
- 10.31 Footfall at most locations in Havant decreased since the 2009 survey, although the decreases from 2008 to 2015 are much smaller and overall there is a 6% increase. The most significant fall from 2009 to 2015 is outside MacDonalDs with a 34% decrease in footfall, although the decrease from 2008 to 2015 is only 8%. This is a significant counting station in that it is an indicator of linkage between Solent Retail Park and the town centre. It is recommended that an additional counting station is used in future to give a clearer picture of the connections between the retail parks and the town centre. Bucking these trends there has been a very clear improvement at the Meridian Centre compared to both 2008 and 2009. This directly reflects the centre's improved performance as its ground floor is now trading at 100% occupancy. Similarly there is a small fall in footfall in Market Parade of 13% from 2009 but compared to the 2008 data it is a 41% increase in 2015. Individual weather conditions do play a part in footfall data. This shows that it is important to continue to monitor footfall as well as retail floor space, use class and occupancy data to build an ongoing and comparative picture of the economic health of the town centre.

#### **Pedestrian flows – Key findings:**

- The retail parks are economically successful and, rather than drawing trade away from the historic town centre, footfall data points towards evidence of a healthy number of linked shopping trips on foot between the east of the town centre and Solent Retail Park.
- Data from May 2015 shows high footfall in West Street, reasonably high footfall between the Solent Road Retail Park and Park Road South and increased footfall at the Meridian Centre compared to both 2008 and 2009.

#### **Recommendations:**

- Continue to monitor footfall in Havant town centre and the Borough's other centres on an annual basis.
- Maintain existing count points for consistency but consider revising or adding further count points in future to take account of new developments.
- Include an additional count point at Solent Road retail park to monitor use of the retail park in addition to the one at Park Road South (which shows footfall between the east side of the town centre and the Solent Retail Park).
- If needed, consider additional ad-hoc counts for specific locations at points in time before and after new retail developments are completed.

# Accessibility/State of Environmental Quality

10.32 Havant is part of the M27 corridor with good rail links and access to other cities and towns. Accessibility and the state of environmental quality in Havant town centre are to be considered more fully in a separate public realm study as part of the wider *Prosperity Havant project*, as well as in a transport study which will consider highway, traffic and other transport improvements across the entire Borough. The public realm document will look at design improvements such as new signage, tree planting and resurfacing which will enhance the appearance of the environment, improve route safety for pedestrians and cyclists and also improve the overall visitor experience for shopping in the town centre. The document will also include a review of short-stay parking arrangements. Key locations identified for particular focus include Elm Lane (including the bus station), Market Parade, North Street, West Street and Park Road South.

## Perception of Safety and Occurrence of Crime

10.33 The years since 2011 have seen a steady reduction in recorded crime and antisocial behaviour in Havant and Emsworth, according to the UK Crime Stats website<sup>32</sup> which reflects the steady fall in overall crime in the UK in the last 20 years. See Figure 12 below. Note that Havant is combined with Emsworth as a single neighbourhood on the UKCrimeStats and Havant Constabulary's<sup>33</sup> websites for the purpose of crime reporting.

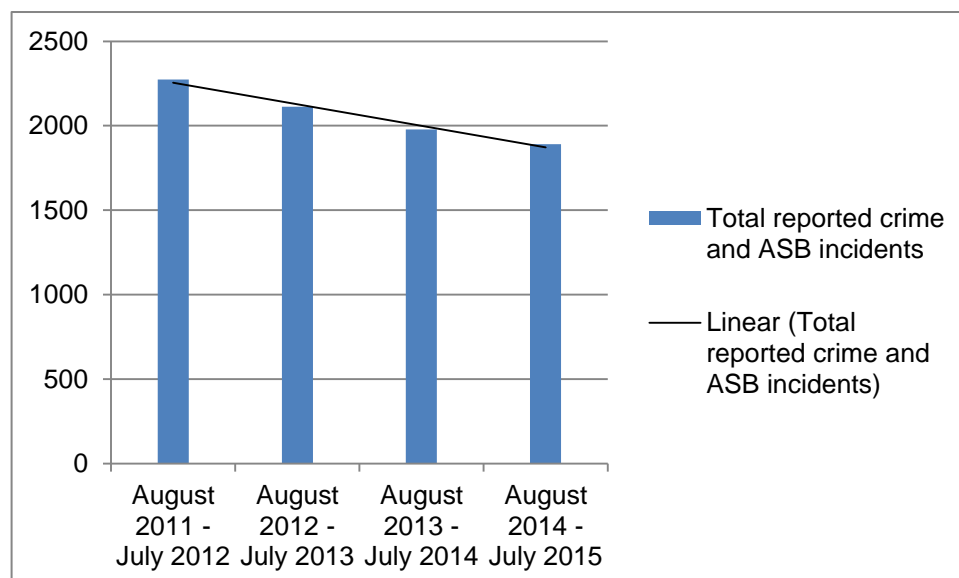


Figure 12: Crime and antisocial behaviour (A SB) incidents in Havant and Emsworth 2012-2015  
Source: UK Crime Stats<sup>34</sup>

10.34 The falling crime levels are a sign that Havant is becoming an increasingly safe place to visit and could have been partly due to closure of some pubs which had contributed to antisocial behaviour (see paragraph 10.8). Data on the Hampshire Constabulary website showing recorded crime

<sup>32</sup> <http://www.ukcrimestats.com>

<sup>33</sup> <https://www.police.uk>

<sup>34</sup> [http://www.ukcrimestats.com/Neighbourhood/Hampshire\\_Constabulary/Havant\\_and\\_Emsworth](http://www.ukcrimestats.com/Neighbourhood/Hampshire_Constabulary/Havant_and_Emsworth)

incidents in the last few years shows a relatively high concentration of crime and antisocial behaviour in Market Parade, in Bulbeck Road and near the rail station, despite the use of CCTV cameras across the town centre. All of these areas are close to takeaways and other uses where antisocial behaviour tends to naturally occur and the quality of the public realm in these areas is relatively low, which could be another influencing factor. Crime and perceived safety is something that should be considered in the forthcoming review of the Local Plan (for example as part of reviewing the retail policies to limit certain uses) as well as in a future public realm SPD, strategy or Local Development Order.

- 10.35 The *Safer Havant Partnership Strategic Assessment 2013/14* identified several areas where Havant has either improved or is continuing to tackle problem areas. The Safer Havant Partnership (whose partners include the Council, the Police, Fire and Rescue, Hampshire Probation Area and Community First Havant and East Hampshire, among others) has successfully implemented a range of initiatives aimed at reducing crime and making the area safer to shop or visit, for example the Safer Places Scheme and Community Alcohol Project<sup>35</sup>.

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<sup>35</sup> *Havant Strategic Assessment 2013/2014, Safer Havant Partnership*



# 11. Havant Town Centre: Conclusions

- 11.1 The retail overview at Section 9 and the analysis of Havant town centre against the 11 NPPG performance indicators in Section 10 has led to several conclusions, which are summarised in the following paragraphs and SWOT analysis table (Table 5).
- 11.2 The NPPG performance indicators suggest an improvement in the overall health and vitality of Havant town centre over the past five years or so. This is reflected in:
- low vacancies, particularly in terms of proportion of overall units; and
  - comparison retail floor space above Local Plan target – this reflects the large size of units available at the retail parks.
- 11.3 Comparison retail floor space in Havant is well represented compared to the UK average, despite a slight under-representation of convenience and comparison retailers in terms of proportion of units. This is considered a positive indicator of Havant town centre’s economic health.
- 11.4 The town centre performs well against the other performance indicators including unit occupancy, diversity of uses and pedestrian footfall. The town centre is also easily accessible in terms of its central location and excellent motorway and rail links.
- 11.5 The polarisation of retail into distinct halves of the town centre, with retail parks in the west and more traditional smaller town centre shops in the east side has not had any adverse impact on the town centre’s performance. As described in section 6, each side performs a complementary role and attracts different markets, whilst at the same time linked trips frequently occur between the two areas, as the footfall data supports. There is also good unit occupancy across the entire town centre.

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Low vacancies below national average.</li> <li>• Falling reported number of crime incidents</li> <li>• The presence of retail parks in the town centre is comparatively rare and provides a range of additional large A1 units to complement the smaller high street and precinct stores. Development of further A1 uses in retail parks within a town centre retail parks are also permissible under the NPPF.</li> <li>• Wide range of stores in ‘traditional’ east part of town centre including independents and multiples</li> <li>• Part of M27/A27 corridor with good rail links and access to other cities and towns</li> <li>• Plentiful free parking at retail parks, in contrast to some other centres outside the Borough.</li> <li>• Considerable parking spaces available in the main heart of the town centre, including off-street car parks (mostly chargeable) and free limited stay on-street bays.</li> <li>• Retail parks economically successful and no specific indications that they are drawing trade from the historic town centre –</li> </ul>	<ul style="list-style-type: none"> <li>• Crime and antisocial behaviour still fairly high relative to some other parts of Hampshire, but falling and being addressed through the Safer Havant Partnership initiatives</li> <li>• Public realm weak in Market Parade, Bulbeck Road and through park to Park Road North/South (will be addressed further through separate work on public realm and accessibility)</li> <li>• Parking charges at Council-owned car parks In Havant remain well used and therefore not directly competing with the plentiful free parking at the retail parks. Although this should be kept under review to see if use falls or there are pricing opportunities to increase income</li> </ul>



<p>increased footfall at Meridian Centre in last year and evidence of linked trips between retail parks and east side of town centre.</p> <ul style="list-style-type: none"> <li>• Further retail units under construction at Solent Road, which will further increase footfall and create jobs and economic growth. In turn this will raise Havant's profile, boosting its vitality and creating an even more attractive market for investors</li> <li>• Up to date Local Plan and adopted CIL giving certainty to developers/investors.</li> </ul>	
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Local heritage can be signposted and highlighted as part of public realm improvements</li> <li>• Opportunity to increase pedestrian links between retail parks and traditional town centre to encourage linked trips (will be addressed further through separate work on public realm and accessibility)</li> <li>• Opportunity to increase cultural, civic and leisure offer in the town centre as alternatives to A1 uses (an approach recommended in <i>Beyond Retail</i> (2013) and other national reports). This may require developer funding for individual or comprehensive schemes.</li> <li>• Opportunity to embrace national trend towards online sales of goods (also a threat – see right column) by developing technological systems and/or encouraging take-up of larger units in the town centre by major retail or leisure uses which can easily adopt such approaches (e.g. click and collect)</li> <li>• Develop a more rounded day, evening and night-time mix of consumer and leisure attractions</li> <li>• Opportunity to capitalise on the potential creation of new available retail floor space in the town centre from redevelopment of existing car park(s), which could provide space for other town centre uses, including leisure as well as retail (will be addressed in separate car parking study)</li> <li>• Opportunity to revise the scale of parking charges at Council-owned car parks to be more competitive and attractive to shoppers, particularly for stays of 1-2 hours.</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Threat from online and multi-channel<sup>36</sup> shopping and recessionary impacts affecting all town and city centre high streets, particularly small and independent shops.</li> <li>• Threat from continued loss of A1 units in primary and secondary frontages – may need addressing through a policy response (as recommended in section 7) as well as other measures aimed at increasing shopper footfall.</li> <li>• Continued competition from other town centres and retail parks, for example Portsmouth's Northern Quarter.</li> </ul>

**Table 9: SWOT analysis of Havant Town Centre retail environment and provision (based on retail overview, NPPF performance indicators and separate research on car parking in Havant)**

<sup>36</sup> Defined as the use of digital channels e.g. online stores, mobile apps and telephone sales, in addition to opportunities to browse and make purchases at physical 'bricks and mortar' stores.

# 12. Havant Town Centre: Boundary Review

- 12.1 The maps of use classes in Havant town centre in Appendices 1 and 2 indicate several units previously occupied by a mixed range of uses at the eastern end of East Street including shops and offices were converted into residential use between 2005 and 2015. As discussed in Section 10, this shift has taken place naturally following a decision to enable flexibility and opportunity in the market by removing the tertiary frontage in Policy TC8 of the 2005 Havant Borough District Wide Local Plan when it was superseded by the Local Plan (Allocations) in 2014.
- 12.2 Data on schemes completed in East Street between 2005 and 2015<sup>37</sup> was analysed to see when these changes of use took place. There were a total of 10 implemented changes of use from commercial to residential uses in East Street over this time period, eight of which affected the ground floor of the units. Six of these schemes were at the eastern end of East Street, between nos. 21 to 37 and nos. 30 to 42. The majority of units between nos. 17/20a and the edge of East Street at its junction with Beechworth Road are now in residential use.
- 12.3 It would make sense on this basis for the Council to redraw the town centre boundary to exclude these units, as per Table 10 below. The map at Appendix 1 also shows this proposed change and which units are to be excluded from the new boundary.

Street	Unit nos to remain in town centre	Unit nos to be deleted from town centre
East Street – North side (odd nos)	1-15(The Bear Hotel)	17-37 (to junction of East St/Beechworth Road)
East Street – South side (even nos)	2-20	20a – 56 (to edge of Town End House/Spring Arts Centre)

Table 10: Havant town centre proposed boundary changes

- 12.4 In future this could partly help to channel applications for new comparison retail units into other parts of the town centre under the existing Local Plan policy CS4, which in turn could help to regenerate those areas, in particular Market Parade and the western end of East Street, where there are relatively high vacancies compared to the rest of the town centre. It would also help to consolidate the town centre in line with the shift in the national retail market towards smaller town centres as discussed in Section 5. This could have positive impacts for Havant’s retail market, particularly if combined with the other proposals in this paper, i.e. regeneration strategies or action plans for East Street and the Meridian Centre to reduce vacancies and incentivise viable development of retail or leisure uses; and the amendments suggested in Section 6 to strengthen Local Plan policy AL3 by restricting certain non-A1 uses.

<sup>37</sup> Source: Hampshire County Council

# 13. Waterlooville Town Centre: Retail Overview

- 13.1 Waterlooville has existed as a settlement since the 18<sup>th</sup> century, but expanded considerably in the post-war period to meet the needs of new residential neighbourhoods. Two shopping precincts were constructed during the 1970s (Wellington Way precinct and The Boulevard, which links London Road to the Dukes Walk shopping centre, which was completed in 2000)<sup>38</sup>.
- 13.2 Waterlooville Town Centre contains some 196 units (182 retail uses) in over 52,000 sq.m. floorspace, as of 2015 (Experian Goad). Many units are located on London Road, which is the traditional main shopping street in the town and which originally formed part of the A3 road network. The opening of the Maurepas Way in 1981 enabled through traffic to by-pass the town centre, from the Rockville Drive junction in the south, around the west and north of the centre, to the Hulbert Road junction in the north. Arising from the formation of Maurepas Way, London Road was partially pedestrianised between 1981-83 and the character and function of London Road changed to provide a more attractive and safer pedestrian environment. Further enhancement works have recently been undertaken to it.
- 13.3 Like Havant, Waterlooville performs the role of a medium-sized town centre within the hierarchy of settlements across the PUSH sub region (as described in section 3). The centre is easily accessible via the A3 (M) but not accessible by rail with the nearest stations at Bedhampton and Havant. Waterlooville is part of the A3 ZIP corridor bus priority network, which has radically improved access to the town by bus since its opening in 2008, as well as reducing emissions and helping to improve pedestrian safety by removing through traffic in the town centre. In future, the aim is for the A3 ZIP to become part of the wider South East Hampshire Bus Rapid Transit (BRT) network, which will connect main towns, including Waterlooville and Havant and proposed strategic development sites<sup>39</sup>.
- 13.4 The town centre's prime shopping area lies to the east of St Georges Walk, Hambledon Road and Stakes Hill Road. There are 98 units with a primary frontage designation within this area, including six that fall within the primary frontage at Wellington Retail Park on Hambledon Road. Within the primary frontages there are 15 vacant units, approximately half of which fall within the Wellington Way shopping precinct and half in London Road.
- 13.5 There is a significant concentration of multiple retailers in this area, including Peacocks, Shoe Zone, Claire's Accessories, Boots, Superdrug, WH Smith's, Waitrose, Poundland, Gamestation, Carphone Warehouse, EE, O<sub>2</sub>, Vodafone, Thomsons travel agents, New Look, Pampurred Pets, Nat West, Halifax, Santander and HSBC. A high proportion of the shops in Waterlooville are comparison uses, 86% of the multiple retail units in this area are A1 uses.

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<sup>38</sup> Town centre vitality and viability assessments, Havant and Waterlooville town centres: Background paper no. 2/10 November 2005, Havant Borough Council

<sup>39</sup> Havant Borough Transport Statement, 2012, Havant Borough Council

- 13.6 To the west of St George’s Walk, with the exception of Dorothy Perkins, the multiple outlets are banks/ building societies (Barclays, Lloyds Bank and Nationwide), food and drink outlets (Subway, Dominos and Poppins cafe/ restaurants) as well as two betting offices (Betfred and Ladbrokes) and seven estate agents (AJ Eyres & Sons, Leaders, Your Move, Jefferies, Beals, Belvoir and Chapplins). There were 63 units in total in this part of the town centre as of October 2015. Whilst most units are independently occupied, only three units were vacant. This contrasts to the high proportion of vacancies in the Wellington Way shopping centre and the Boulevard, which totalled around 30% as of October 2015.
- 13.7 Section 14 provides a categorised breakdown of the uses in the town centre, whilst Figure 13 below indicates the general location of Waterlooville town centre’s key shopping areas and major retail sites in relation to each other:

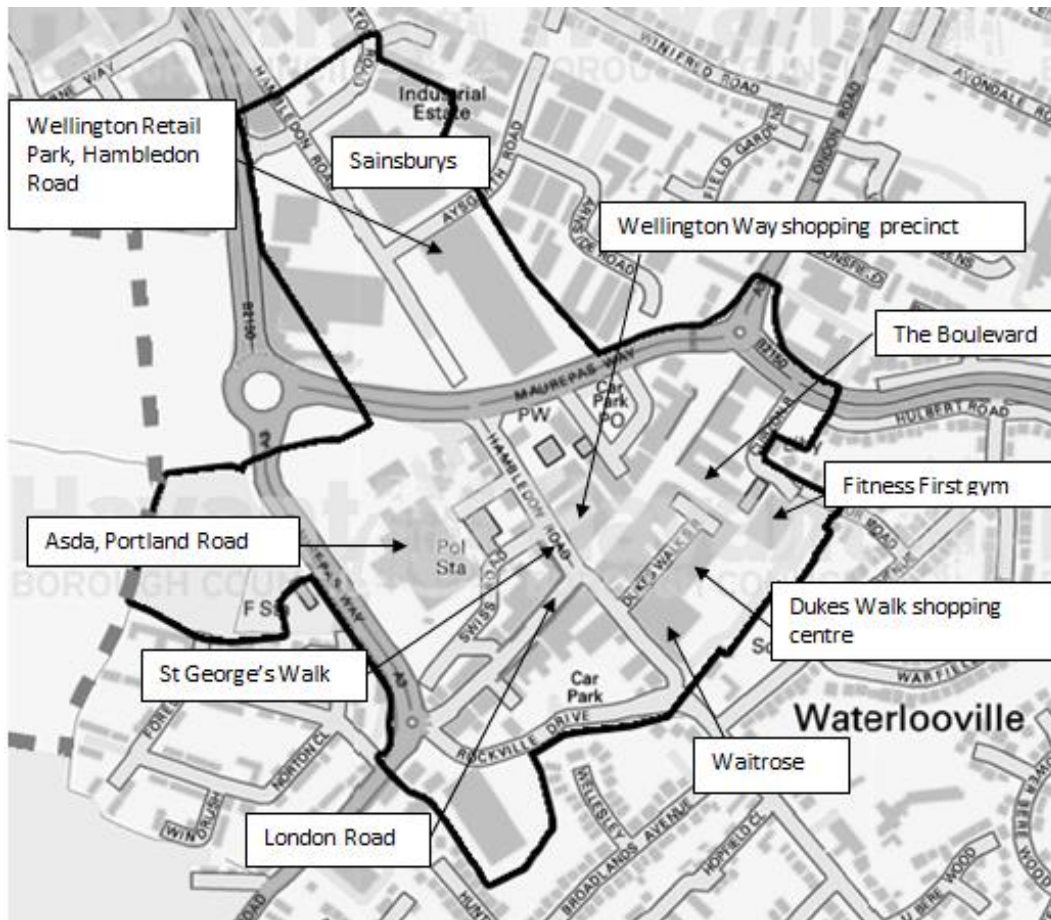


Figure 13: Waterlooville’s key shopping areas

- 13.8 A brief summary of Waterlooville’s key shopping areas is provided in Table 11 below:

Area	Retail mix
Wellington Way	The Wellington Way centre is an enclosed shopping centre built in the 1970s. It has direct connections from the surface level car park through the centre to London Road. The centre contains 27 shop and service units which house a variety of multinational and independent traders as well as four charity shops. It is performing poorly overall, with a large proportion of the units vacant (30% as of October 2015).
The Boulevard	The Boulevard is a pedestrianised area to the south east of London Road which links London Road to the Dukes Walk shopping centre. It also dates from the

	1970s. It has 21 units, out of which 6 (29%) are vacant. Due to their small size most of the units are independent traders, however occupiers also include Costa Coffee and O <sub>2</sub> . Five of the 15 occupied units are charity shops.
St George's Walk/Stakes Hill Road	St George's Walk (which falls within a within a secondary retail frontage) and Stakes Hill Road contain a mixture of shops, services and other uses. Other services and uses include offices (B1), hairdressers and a dental surgery. St George's Walk provides a direct connection on foot between London Road and Wellington Retail Park.
Dukes Walk	The Dukes Walk shopping centre consists of a terrace of 10 retail units, alongside a Waitrose supermarket and Wilkinsons anchoring the scheme to either side of the terrace. The units, all of which are occupied, overlook a large shared surface level car park. Other occupiers include New Look, Bon Marché, Edinburgh Woollen Mill, Robert Dyas and Card Factory. The scheme has good connections with London Road via The Boulevard, but otherwise faces away from the rest of the centre.
London Road	London Road is the traditional main shopping street in Waterlooville and can be considered as the High Street. It contains a range of shops and services, consisting of predominantly A1 uses and multiple traders. Vacancy rates are very low. The pedestrianised part of London Road is also the location for a bustling street market held once a week on Fridays which attracts lots of visitors.
Wellington Retail Park	Large retail units housing major brand multiple stores including Matalan, Argos Extra, TK Maxx, M&S Food, Dreams, Brantanos, Carpetright and DFS. The retail park is connected to the rest of the town centre on foot via an underpass beneath the A3 as well as a pedestrian crossing over it. To the immediate north there is a large Sainsbury's superstore. This opened in December 2014 and has an adjacent free surface car park and undercroft parking. The retail park was included in the town centre as part of the previous Local Plan boundary review in 2014.
Asda	Extensive (c. 3,285 sq. m.) supermarket to the northwest of London Road, at the western end of the town centre. The store sells both convenience and comparison goods. Vehicular access is directly from the A3 Maurepas Way and the store has a large free car park which also serves as car parking for visitors to the rest of the town centre, subject to a two hour limit. The store is also accessible on foot via Portland Road and other parts of the town centre although pedestrian routes are not clearly signposted.

Table 11: Summary of Waterlooville's key shopping area

# 14. Waterlooville Town Centre: Health Check

14.1 The National Planning Practice Guidance (NPPG) recommends ten performance indicators for local planning authorities to use to assess the economic health of town centres. These are:

- Diversity of uses
- Proportion of vacant street level property
- Commercial yields on non-domestic property
- Customers' views and behaviour
- Retailer representation and intentions to change representation
- Commercial rents
- Pedestrian flows
- Accessibility
- Perception of safety and occurrence of crime
- State of town centre environmental quality.

14.2 This section of the report considers Waterlooville town centre in relation to the majority of the above indicators. Public realm and accessibility are considered but will be addressed to a greater degree by other parts of the *Prosperity Havant* project.

## Diversity of Uses

14.3 As described in section 13, Waterlooville town centre has a significant concentration of multiple retailers and comparison A1 uses at its eastern end, within the primary shopping area and at Wellington Retail Park; whilst the town centre's western end is characterised by independent retailers. These are illustrated in the map of the centre's use classes at Appendix 3.

14.4 Figure 14 shows the number of units across Waterlooville town centre that fall into different land use categories (use classes).

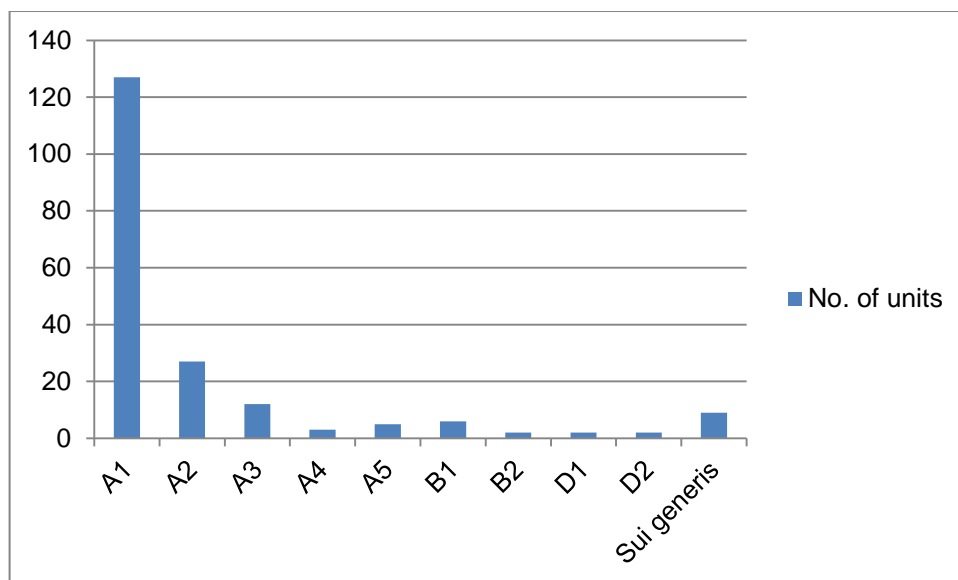


Figure 14: Use classes within WaterlooVille town centre as of October 2015

14.5 Table 12 and Figures 15 and 16 compare the proportion of retail class units and floorspace in WaterlooVille town centre to UK average figures. In terms of units, the centre has a high proportion (45.1%) of comparison uses, which is above the UK average (40.91%) for town centres. The centre is slightly underrepresented for convenience uses, catering uses (restaurants, cafes, pubs and takeaways) and services. Vacant units are equal to the national average (12.6%). In floorspace terms, the centre performs considerably better than the UK average for comparison floorspace (57.6% in WaterlooVille against 46% nationally) and also has more convenience floorspace (20.7% against 17.79%). Vacant floorspace (4.7%) is also considerably lower than the average for the UK (10.7%).

Sector	Units (count)	Units (%)	UK average (%)	Floorspace (sqm)	Floorspace (%)	UK average (%)
Convenience	11	6.0	8.81	1,830	20.7	17.79
Comparison	82	45.1	40.91	30,120	57.6	46.02
Catering	17	9.3	16.39	2,510	4.8	11.79
Services - A2	25	13.7	8.68	3,630	6.9	7.06
Services - Other	19	10.4	11.45	1,890	3.6	5.61
Other	5	2.7	1.16	890	1.7	1.03
Vacant	23	12.6	12.6	2,450	4.7	10.7
TOTAL	182	100	100	52,320	100	100

Table 12: Percentage and floorspace in retail use class categories in WaterlooVille town centre – October 2015

Source: Unit count from HBC survey (March 2015); Floorspace data for WaterlooVille and UK average % units and floorspace from Experian Goad<sup>40</sup>.

<sup>40</sup> Note: Vacant units recorded separately to allow comparison of sectors with UK averages.



NOTES:	
Sector	Types of unit included
Convenience	Food shops - butchers, bakers, fruit & veg, fish, supermarkets.
Comparison	Clothing, chemists, furniture, DIY, Books/news, electrical, jewellery.
Catering	Restaurants, cafes, takeaways, pubs.
Services – A2	Banks and building societies, finance, insurance, estate agents.
Services - Other	Repairers, taxi, travel agents, hairdressing, funeral, dry cleaning.
Other	Employment services, careers.

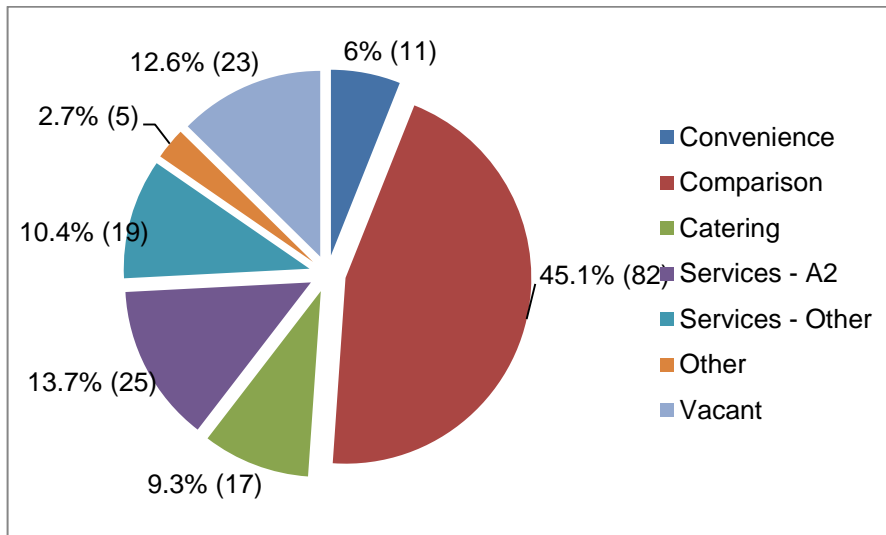


Figure 15: Percentage of units\* in retail categories, Waterlooville town centre – October 2015  
\*N.B. unit counts shown in brackets after percentages

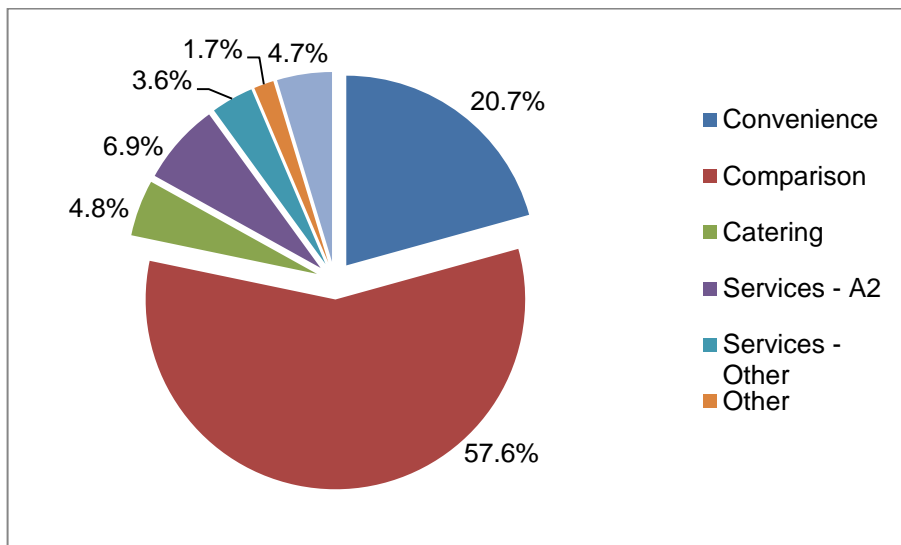


Figure 16: Percentage of floorspace in retail categories, Waterlooville town centre – October 2015

14.6 The number of charity shops in the town centre has almost doubled from 7 in 2008 (8 in 2011) to 13 in 2015. This has been a very noticeable pattern in Waterlooville although it is also a trend observable nationally as other multiples across the UK are shifting from smaller and medium-sized town centres to larger town centres, leaving vacant A1 retail units. These vacant units are easily reoccupied by charity shops, which qualify for relief on business rates<sup>41</sup>. Town centre locations are also attractive for them as they are accessible for their volunteers and have higher footfall. A large

<sup>41</sup> Charities qualify for an 80% reduction on business rates under current legislation (<https://www.gov.uk/apply-for-business-rate-relief/charitable-rate-relief>)



number of charity shops does not necessarily indicate economic underperformance, particularly if the units that they occupy are generally small in size<sup>42</sup>. They also provide active uses for units that might otherwise remain vacant and help to retain footfall and spending as well as providing social value through voluntary work opportunities<sup>43</sup>. To make a complete assessment of a centre's performance, indicators such as retail sales, vacancies over time, diversity and pedestrian footfall therefore need to be considered – these are looked at in more detail within this section.

## Diversity of Uses – A1 Representation

- 14.7 In October 2015 there were 127 commercial A1 units in the town centre, of which 117 (92%) were occupied. This represents 67% of all occupied units. Table 13 compares A1 representation in the town centre in October 2015 with A1 representation using the former town centre boundary. The boundaries for both Waterlooville and Havant were enlarged as part of the Local Plan (Allocations), which resulted in an increase in the number of A1 units as well as A1 floorspace for both centres.

	<b>2015</b> (Figures in brackets indicate total A1 units using pre-2014 boundary, i.e. excluding Wellington Retail Park)
<b>Total A1 units</b>	127 (114)
<b>Total occupied A1 units</b>	117 (104)

Table 13: A1 representation in Waterlooville as of October 2015 and using pre-2014 town centre boundary

- 14.8 Figure 17 illustrates changes in the number of A1 uses in the town centre's primary frontages between 2008 and 2015. The number and proportion of occupied A1 uses in the primary frontages have both increased steadily since 2009. Occupied A1 retail floorspace across the town centre and primary frontages has also increased in this period. These two facts are primarily due to the inclusion in 2014 of 13 A1 units at Wellington Retail Park, 8 of which are in a primary frontage, as part of the review of boundaries and frontages for the Local Plan (Allocations). The inclusion of Wellington Retail Park in the town centre boundary reflects its continued contribution in attracting shoppers to Waterlooville town centre.

<sup>42</sup> BIS Research Paper No. 188: Policy Implications of recent Trends in the High Street/Retail Sector ([https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/389385/bis-14-1124\\_Research\\_paper\\_188\\_Policy\\_implications\\_of\\_recent\\_trends\\_in\\_the\\_high\\_street-\\_retail\\_sector.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/389385/bis-14-1124_Research_paper_188_Policy_implications_of_recent_trends_in_the_high_street-_retail_sector.pdf))

<sup>43</sup> Giving Something Back, Demos, 2013 ([http://www.demos.co.uk/files/DEMOS\\_givingsomethingbackREPORT.pdf?1385343669](http://www.demos.co.uk/files/DEMOS_givingsomethingbackREPORT.pdf?1385343669))

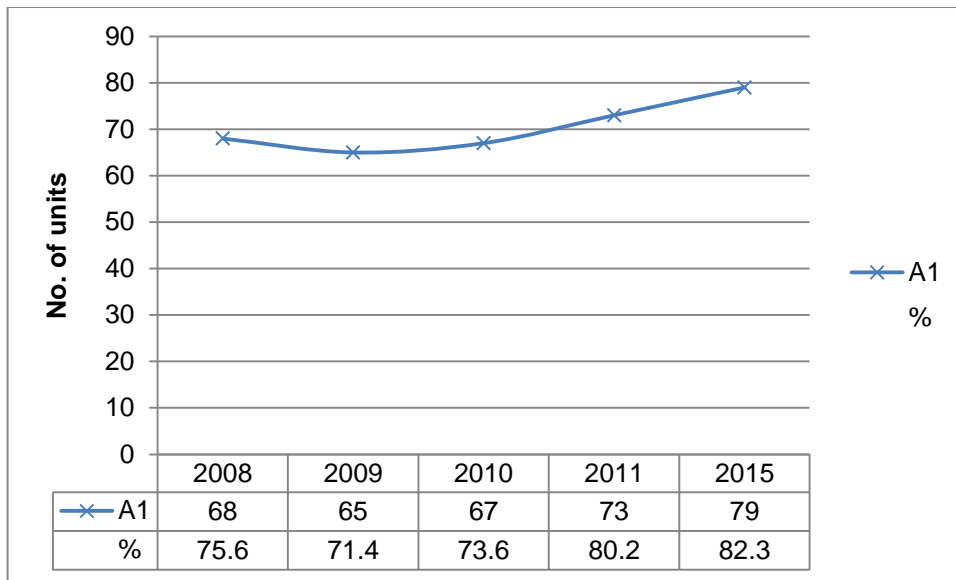


Figure 17: A1 uses in Waterloo primary frontages 2008-2015 (including vacant units)

14.9 Figure 18 shows that A1 representation in the town centre's secondary frontages has fluctuated slightly since 2008, and remained steady since 2011. In October 2015 the proportion of occupied A1 units across all secondary frontages was 46%, which is well above the 25% threshold in policy AL3.

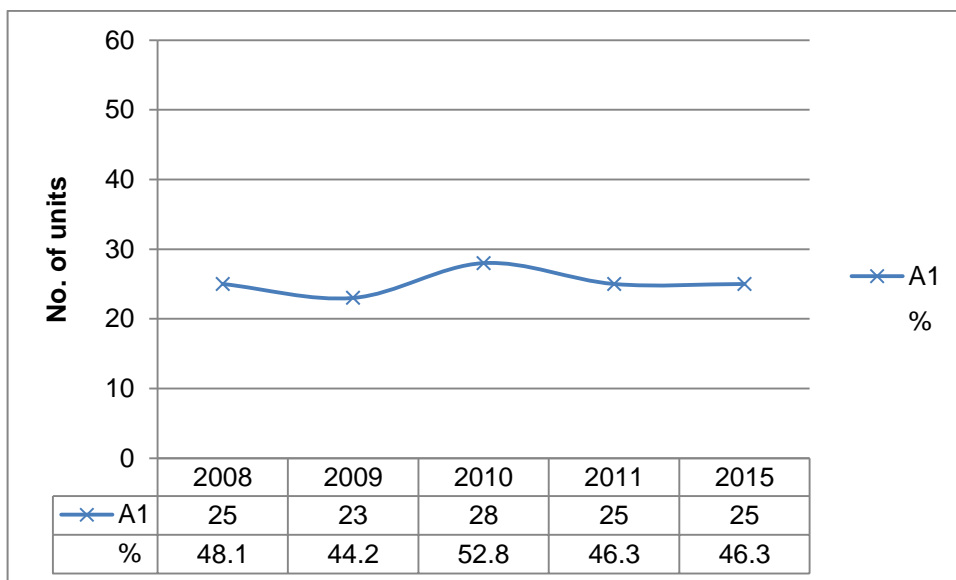


Figure 18: A1 uses in Waterloo secondary frontages 2008-2015 (including vacant units)

### Diversity of uses – key findings:

- A1 floor space within Waterlooville town centre has significantly increased as a result of the town centre boundary and frontages review in 2014 whilst numbers of A1 units across the town centre have also increased since 2008 (from 101 in 2008 to 117 in 2015).
- The number and proportion of occupied A1 uses in the primary frontages have both increased steadily since 2009. This was mainly due to the inclusion of 13 A1 units at Wellington Retail Park.
- Occupied A1 uses have increased in the primary frontages and remained steady in the secondary frontages over the last few years.
- Doubling in the number of charity shops in the town centre, from 7 in 2008 (8 in 2011) to 13 in 2015. There has been a national trend for a strong performance of discount stores, charity shops and budget supermarkets as other multiples across the UK have shifted from smaller and medium-sized town centres to larger town centres. The trend is also partially the result of discounters broadening their range of goods and shoppers seeking greater value.

## Proportion of Street-level Vacancies

14.10 Figure 19 shows the change in the percentage of vacant ground floor level retail units in Waterlooville town centre between 2009 and 2015.

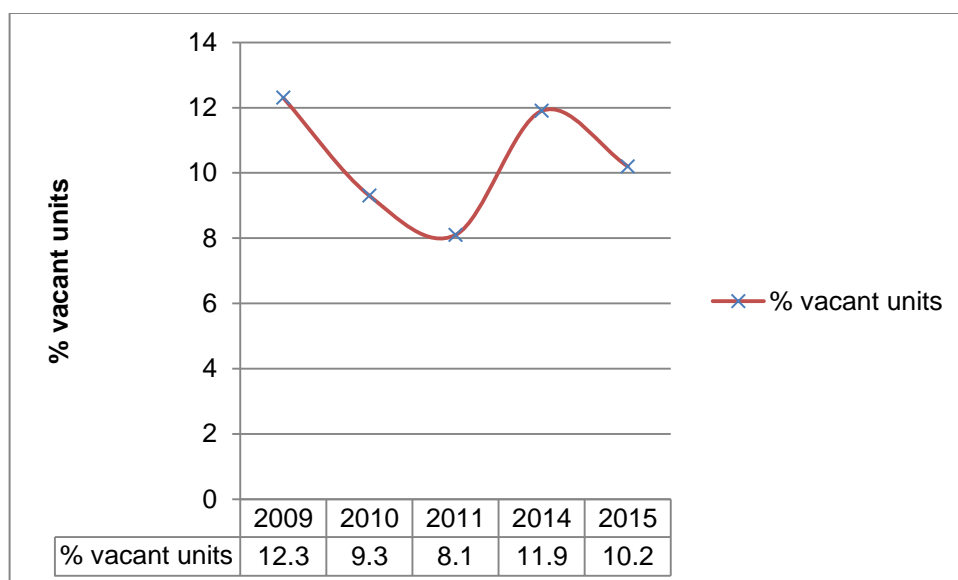


Figure 19: Retail vacancies in Waterlooville town centre 2009-2015

14.11 The proportion of vacancies in Waterlooville town centre fell dramatically between June 2009 and June 2010, between 12.43% and 9.1%. This follows a similar trend to Havant and the Borough's other centres and was likely to be due to increased shopper numbers following the peak of the recession.

- 14.12 In October 2015 there were 196 commercial units in the town centre, of which 176 (89.8%) were occupied. The national average vacancy rate for town centres across England in July 2015 was 11.6% (The Local Data Company<sup>44</sup>). The vacancy rate for Waterlooville town centre as a whole in October 2015 was below this, at 10.2%<sup>45</sup>.
- 14.13 The 100% occupancy of Waterlooville town centre's retail parks is consistent with the trend referred to in section 5. Other parts of the town centre are also performing well although vacancies in the Wellington Way shopping centre and The Boulevard are high and have increased in the past few years, particularly in the Wellington Way shopping centre, which saw vacancies rise from 3.7% to 30% between 2011 and 2015.
- 14.14 Table 14 shows the percentage of units for each unbroken run of frontage within Waterlooville town centre that are presently vacant. The frontage runs were established by using the Local Plan Proposals Map which shows unit numbers. As per policy AL3, the frontages include minor breaks in the building line, such as alleyways, but exclude substantial breaks, i.e. road junctions and crossroads.

Primary(P)/Secondary(S)	Unbroken run	Addresses	Vacant units	% vacant
Primary	P1	1-15 Dukes Walk and Waitrose Ltd	0/12	0%
Primary	P2	3-23 The Boulevard (odd nos.)	3/10	30%
Primary	P3	4-18 The Boulevard (even nos.)	3/8	38%
Primary	P4	93-119 London Road (odd nos.)	0/14	0%
Primary	P5	278-310 London Road (even nos.)	1/14	7%
Primary	P6	1-11 Wellington Way	4/10*	40%
Primary	P7	12-21 Wellington Way	3/8**	38%
Primary	P8	22-34 Wellington Way	1/9***	11%
Primary	P9	2-14 Wellington Retail Park (even nos.)	0/6****	0%
Secondary	S1	75-81c London Road (odd nos.) and 1-9 The Clock House	2/17	12%
Secondary	S2	1-9 Queens Parade and 125 London Road	0/11	0%
Secondary	S3	244-274 London Road (even nos.)	0/17	0%
Secondary	S4	1 The Boulevard and 310a-326 London Road (even nos.)	0/10	0%

**Table 14: Percentage of vacant units in Waterlooville town centre primary and secondary frontages, October 2015**

\*Nos. 3-4 counted as a single unit

\*\*Nos. 18-21 counted as a single unit

\*\*\*Nos. 22-24 and 25-28 counted as single units

\*\*\*\*Nos. 12-14 counted as a single unit

- 14.15 As can be seen from the table, most areas of the town centre that fall within a frontage designation have a healthy occupancy, with nearly half of the frontages displaying full unit occupation. However within The Boulevard (P2 and P3) and the west side of Wellington Way shopping centre (P6 and

<sup>44</sup> [http://www.theretailbulletin.com/news/uk\\_shop\\_vacancy\\_remains\\_at\\_1\\_in\\_july\\_07-08-15/](http://www.theretailbulletin.com/news/uk_shop_vacancy_remains_at_1_in_july_07-08-15/)

<sup>45</sup> Note that this vacancy rate includes all recorded commercial use classes within the town centre, including leisure and non-retail uses.

P7), there are pockets of very noticeably high vacancies in the region of 30-40%. Although both of these centres were built in the 1970s and of a dated design, there is no specific obvious reason for their poor performance.

14.16 The Council has recently commissioned a short piece of work to consultants to look at potential quick wins and longer term options for regenerating Waterlooville town centre and make better use of its space in future. This project cites a number of issues that may account for the comparatively poor performance of this core part of the town centre. These issues include:

- The draw of business from the town centre historic core created by the attractive food and comparison retail offer at the adjacent Wellington Retail Park, including Sainsbury's;
- Poor condition of many of the town centre retail units;
- The absence of an established night time economy, particularly restaurants; and
- A differential car parking offer, with free parking at the retail park and at Asda, and Pay & Display parking at the two Council-owned car parks and the privately operated Dukes Walk and Central (NCP) car parks.

14.17 Targeted regeneration/reconfiguration of the town centre would help to tackle the current problem of high vacancy rates in the shopping centres. Some broad suggested options to help regenerate the centre have been put forward in the SWOT analysis in Section 15 (Table 18). It is recommended that the implementation of the quick wins from the consultants' work continues with a degree of urgency, particularly as any future regeneration initiatives could capitalise on the potential opportunities for increased shopping trade presented by the major development scheme underway at the West of Waterlooville MDA (see paragraphs 14.21-14.22).

#### **Street-level vacancies – key findings:**

- Waterlooville town centre's retail vacancies as a whole are below the national average, as of October 2015 (10.2% compared to 11.6%), however surveys of the retail units in the town centre reveal pockets of very high (30-40%) vacancy levels within Wellington Way shopping centre and The Boulevard.
- Fall in the proportion of occupied commercial units across the town centre as a whole between 2014 and 2015, but an increased proportion of occupied A1 units within the town centre's primary frontages.

#### **Recommendations:**

- Continue to progress the targeted work by consultants to focus on quick wins to regenerate Waterlooville town centre and make better use of its space (see paragraphs 14.16–14.17). Targeted regeneration initiatives within the town centre should help to address the pockets of high retail vacancies within the Wellington Way and Boulevard shopping precincts. A more attractive and successful town centre would also be able to effectively capitalise on future opportunities for increased trade from existing residents as well as from new residents of the major scheme currently underway at the West of Waterlooville MDA (see paragraphs 14.21–14.22).

# Convenience and Comparison Goods Spending Patterns

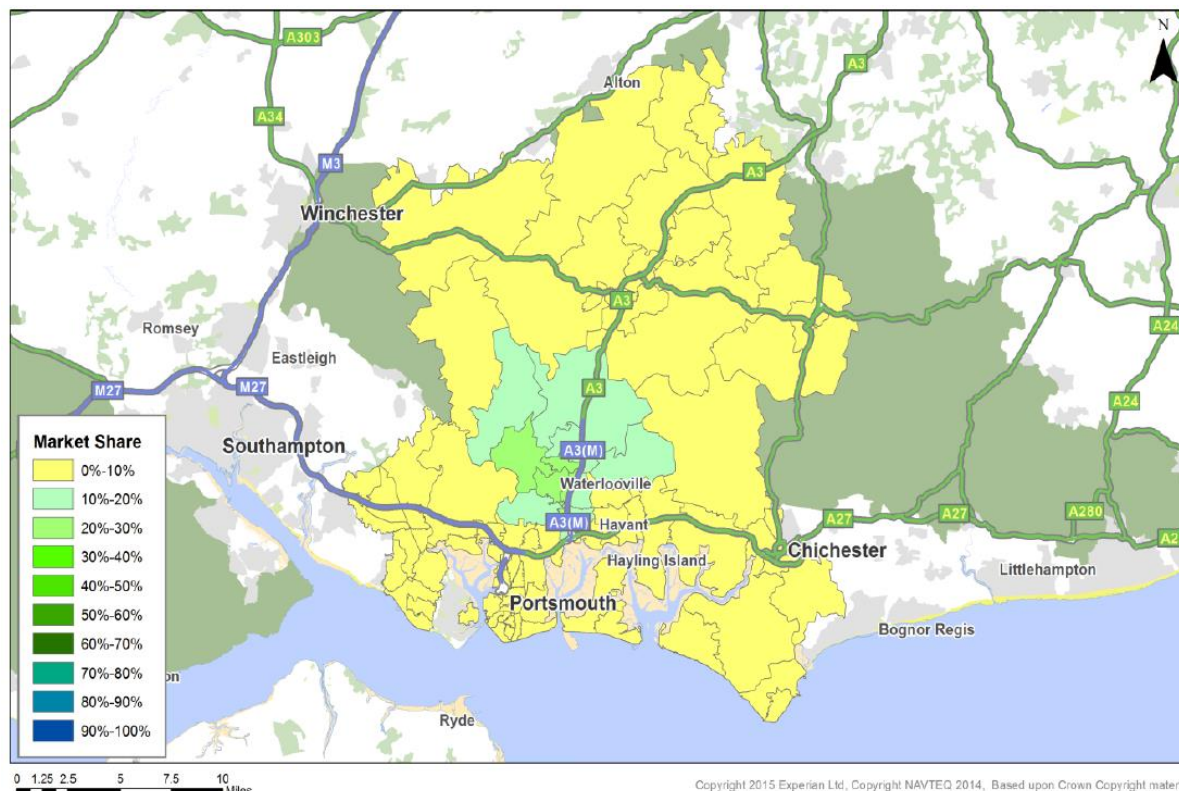


Figure 20: Retail catchment for Waterlooville town centre

14.18 The map at Figure 20 shows Waterlooville’s market share for shopper expenditure within its total retail catchment area, with the light green shaded postcode sector areas representing the average percentage of residents of areas closest to Waterlooville that shop in Waterlooville town centre.

14.19 The total comparison goods expenditure within the entire catchment in 2014 was £132.5m<sup>46</sup>. This is indicated by Table 15 which also shows the breakdown of expenditure in other sector categories.

	Catchment spend (£'000s)	%	GB spend (£'000s)	%
Total comparison	132,507	46.5	196,900,541	45.5
Total convenience	76,942	27.0	118,690,524	27.4
Total leisure	75,411	26.5	117,342,878	27.1
Total expenditure	284,860	100.0	432,933,943	100.0

Table 15: Total shopper expenditure Waterlooville’s retail catchment (2014)

Source: Experian (2015)

14.20 Waterlooville’s non-food market share, i.e. total comparison goods expenditure spent in Waterlooville town centre as a proportion of its total retail catchment area is 6.2%<sup>47</sup>. This is slightly higher than Havant’s non-food market share as a proportion of its catchment area (5.2%), despite

<sup>46</sup> Source: Experian (2015).

N.B. The expenditure data provided by Experian for Havant for the 2015 Town Centre Shopper Report is lower than that used in the 2009 NLP Retail Study due to Experian using a smaller study/catchment area in 2015.

<sup>47</sup> Source: Where Britain Shops, 2014 (Experian Town Centre Shopper Report, November 2015)

Waterlooville having a slightly smaller shopper population<sup>48</sup>. Both town centres have retail parks within their boundaries and immediate retail catchment areas although Waterlooville also has a medium sized Asda store at Portland Road, within the town centre boundary. Shopper expenditure in Waterlooville may be adversely influenced by the presence of another Asda supercentre at Larchwood Avenue, which is likely to receive a high volume of trade from the town's large housing estates and draw trade which otherwise may have gone to Waterlooville town centre.

## **West of Waterlooville Major Development Area (MDA)**

- 14.21 The proportion of spend in Waterlooville's catchment area could increase further as new development continues at the Major Development Area (MDA) to the immediate west of the A3 (London Road). The MDA site is located mainly within Winchester district but is centred on the settlement of Waterlooville and Waterlooville Town Centre is the closest higher order town centre to the new development. The scheme has planning permission for around 3,000 dwellings across the entire site. The development, which is currently underway, will create a new community and include employment and mixed use land. The new uses will include two primary schools, a local centre and areas for open space and recreation. There are no major new retail developments proposed within the site. This development close to the edge of Waterlooville town centre will create an enlarged market/spend for retail uses within Waterlooville's catchment area. It presents an invaluable opportunity for the town centre to attempt to capture a large share of this substantial emerging market, rather than risk it going to competing centres elsewhere.
- 14.22 The overall development is taking place in phases and the rate at which the dwellings at the MDA will be completed will depend on market conditions, but the scheme is well underway, with a number of dwellings now complete at the Berewood site and a new primary school having opened there in 2014. The opening of a Sainsbury's supermarket at Wellington Retail Park is already acting as a draw into Waterlooville town centre for residents in and around the town; the regeneration initiatives planned in the town centre described at paragraphs 14.16-14.17 will further increase the centre's attractiveness as a shopping destination, whilst these new retail uses will benefit from the potential additional trade arising from the MDA.
- 14.23 Patterns of spending are also indicated by shopper and expenditure leakage to other centres. Key competitors for Havant and Waterlooville as one would expect are the larger higher order town centres of Fareham and Chichester; and Portsmouth City Centre, which is a regional city centre in the PUSH sub-regional hierarchy of centres in Figure 1 (section 3).
- 14.24 Havant's retail catchment experienced 20.3% leakage of comparison expenditure to central Portsmouth<sup>49</sup> in 2014 whilst Waterlooville experienced 20.9% leakage to central Portsmouth. Havant has a higher leakage of expenditure to Chichester and, in terms of total expenditure; Waterlooville retains a greater proportion of comparison spending than Havant within its catchment shopper population. These figures are illustrated in Tables 16 and 17.

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48 647,440, compared to 619,719

<sup>49</sup> Not including Gunwharf Quays

	Leakage from Catchment			
Retail Centre	Shopper population	%	Shopper Expenditure (£)	%
Portsmouth - Central	129,452	20.9%	666,906,084	20.1%
Chichester	55,320	8.9%	292,408,879	8.8%
Fareham	51,799	8.4%	298,602,373	9.0%
<b>Waterlooville</b>	<b>38,345</b>	<b>6.2%</b>	<b>209,892,876</b>	<b>6.3%</b>
Havant	32,740	5.3%	177,005,149	5.3%
Portsmouth - Gunwharf Quays	28,598	4.6%	141,432,180	4.3%
Southampton Central	24,194	3.9%	130,661,579	3.9%
Gosport	23,016	3.7%	139,729,237	4.2%
Petersfield	18,852	3.0%	93,406,115	2.8%
Portsmouth - Ocean Park Retail Park	17,675	2.9%	91,138,891	2.7%
Other	199,728	32.2%	1,076,966,139	32.5%
<b>Total</b>	<b>619,719</b>	<b>100.0%</b>	<b>3,318,149,503</b>	<b>100.0%</b>

**Table 16: Key competitors for Waterlooville**

Source: Experian (2015)

	Leakage from Catchment			
Retail Centre	Shopper population	%	Shopper Expenditure (£)	%
Portsmouth - Central	131,225	20.3%	676,938,185	19.5%
Chichester	76,159	11.8%	433,364,006	12.5%
Fareham	57,494	8.9%	306,207,254	8.8%
Waterlooville	38,126	5.9%	208,417,926	6.0%
<b>Havant</b>	<b>33,747</b>	<b>5.2%</b>	<b>182,558,228</b>	<b>5.3%</b>
Portsmouth - Gunwharf Quays	28,857	4.5%	143,013,201	4.1%
Southampton Central	24,565	3.8%	132,424,689	3.8%
Gosport	19,051	2.9%	94,698,700	2.7%
Petersfield	18,152	2.8%	111,115,237	3.2%
Portsmouth - Ocean Park Retail Park	17,941	2.8%	92,661,707	2.7%
Other	202,123	31.2%	1,082,324,046	31.2%
<b>Total</b>	<b>647,440</b>	<b>100.0%</b>	<b>3,463,723,180</b>	<b>100.0%</b>

**Table 17: Key competitors for Havant**

Source: Experian (2015)

## Rents

- 14.25 The latest available data for commercial rents in Waterlooville are in the 2009 Town Centres, Retail and Leisure Study by Nathaniel Lichfield and Partners (in Table 4.2). This is now a few years old but showed that Waterlooville town centre had experienced growth in Zone A prime retail rents between 2006 and 2007, following a long period of static rents between 2001 and 2006.

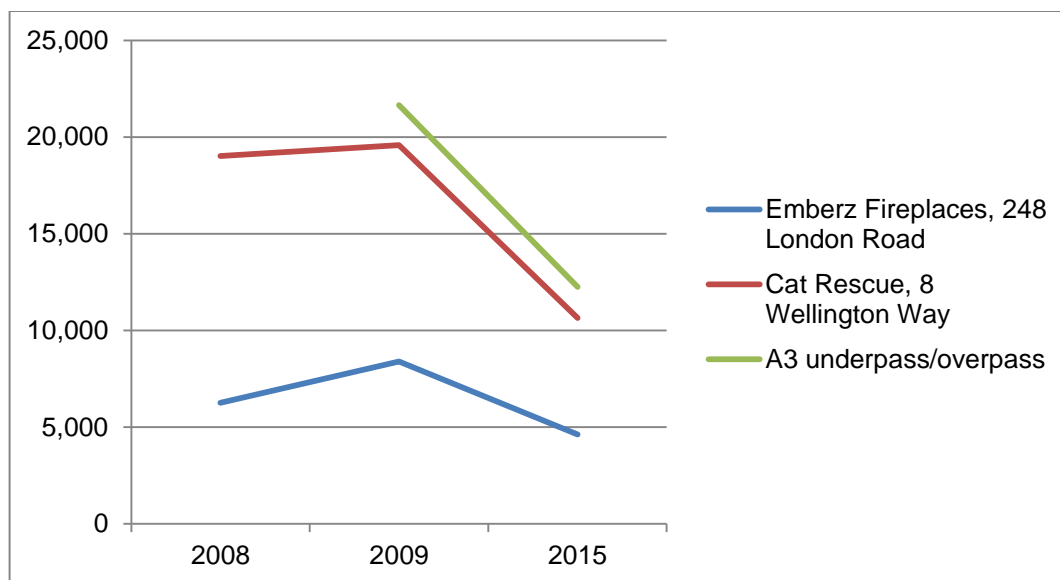


# Pedestrian Flows

- 14.26 Monitoring pedestrian footfall is a key method of recording evidence of shopping centre vitality that can be used to help assess the impact of future development proposals and justify planning decisions on them as well as in adjusting the Council's existing retail policies and shopping frontages. This will be important for implementing new retail policies as part of any future Local Plan review. It is vital to continue to monitor footfall on a regular basis in the town centres to enable analysis of on-going trends which may be affected by new stores or store closures or by new or amended planning policies or other positive interventions, for example public realm improvements.
- 14.27 Waterloo town centre has the advantage of having the Wellington Retail Park within its boundary which attracts a considerable number of visitors, mainly by car but also on foot from London Road via the bridge underpass/overpass crossing the A3. This is shown in Figure 21 which illustrates the results of manual pedestrian footfall counts undertaken at this and six other locations in Waterloo town centre between 2008 and 2015. The figures in the table represent total footfall recorded over an entire week between 10am and 4.30pm<sup>50</sup>.

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<sup>50</sup>Data was obtained at each footfall station over two days and then a standard multiplier was used to convert it into a total weekly equivalent number (WEN).



Footfall station	2008	2009	2015	Commentary
A) Vodafone, 314 London Road	-	-	7573	
B) O2 Phones, 9 The Precinct	-	-	12550	
C) Poundland, 304 London Road	-	-	18946	
D) Emberz Fireplaces, 248 London Road	6262	8403	4629	45% decrease in footfall from 2009 – only 26% down on 2008
E) Cat Rescue, 8 Wellington Way	19026	19588	10650	46% decrease since 2009 – similar in 2008
F) A3 underpass/overpass	-	21649	12256	43% decrease since 2009
G) Sainsburys, Hambledon Road	-	-	8536	
Footfall total for stations D) to E & F) (2009-2015)	25,288	49640	27535	45% decrease

Figure 21: Total weekly footfall in WaterlooVille town centre, 2008-2015

- Dashes represent where there was no previous survey data

14.28 Footfall at the western end of London Road (footfall station D) and in the Wellington Way shopping centre (footfall station E) both increased between 2008 and 2009 then fell sharply between 2009 and 2015 – 45% & 46% respectively. Whilst there were footfall decreases in Havant they were of the 20-30% order and much less compared to 2008 data (see section 10). Whilst the falling trade across town centres is being observed nationally the difference in scale between Havant and WaterlooVille, which both have the characteristic of successful edge of/in centre retail parks, could be explained by the different pedestrian connections and parking opportunities in the two centres; WaterlooVille old town centre showing less connection to the newer retail areas. It may also be noted that the scale of footfall in WaterlooVille overall is lower than in Havant. Nevertheless the highest weekly footfall for both 2009 and 2015 was recorded at the A3 underpass/overpass connecting London Road to the Wellington Retail Park indicating that the connections continue to effectively function. The retail park has 100% unit occupancy and observation of visitor numbers and cars parked both indicate that it is trading well.

14.29 The opening of Sainsbury's in Hambledon Road, to the immediate north of Wellington Retail Park in December 2014 has also helped to increase footfall at the northern end of the town centre. Shopping activity at the retail park and the rest of the town centre will continue to be monitored on an annual basis by ongoing assessment of pedestrian flows at the A3 underpass/overpass and Sainsbury's. The data indicates that there are a high number of linked shopping trips between the

retail park and the rest of the town centre to the south. It may therefore be the case that the new supermarket will have a positive ongoing impact on trade across the rest of the town centre as well as at Wellington Retail Park. As with Havant town centre, it appears unlikely that the retail park poses competition for other shops in the town centre due to the difference in the type and size of shops in each part of the centre, each of which serves a different need. Further annual footfall surveys across the centre should help to confirm whether or not this might be the case.

## Accessibility/State of Environmental Quality

- 14.30 Waterlooville lies close to the A3(M) and M27 corridor and is easily accessible by car/bus via the A3 (M). Surface car parking is a dominant land use, with minimal areas of public open space or landscaping and relatively poor signposting. This factor combined with the encircling road network makes the area attractive for visitors travelling by car albeit less attractive for pedestrians and cyclists. However there are several pedestrian routes through the town centre's shopping precincts which make it easier to move between different parts of the town on foot.
- 14.31 Accessibility and the state of environmental quality in Waterlooville town centre are to be considered more fully in future work as part of the wider *Prosperity Havant* project, as well as in a transport study which will consider highway, traffic and other transport improvements across the entire Borough. Future background work on Waterlooville, which may be commissioned, will look in more detail at access and the quality of the town centre shopping environment, develop short term wins and longer term options for regeneration with a focus on deliverable schemes rather than aspirational plans.

## Perception of Safety and Occurrence of Crime

- 14.32 According to UK Crime Stats<sup>51</sup> there was a steady reduction in recorded crime and antisocial behaviour in Waterlooville North between 2011 and 2014, which reflects the steady fall in overall crime in the UK in the last 20 years - see Figure 22. 2015 saw an increase in recorded incidents compared to 2014. Hampshire Constabulary's Neighbourhood Policing Team for Waterlooville has recently put in place various initiatives, including 'Operation Blitzen' which aims to tackle shoplifting and theft in the town centre, particularly in the run up to Christmas, by liaising with shop security staff.

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<sup>51</sup> <http://www.ukcrimestats.com>

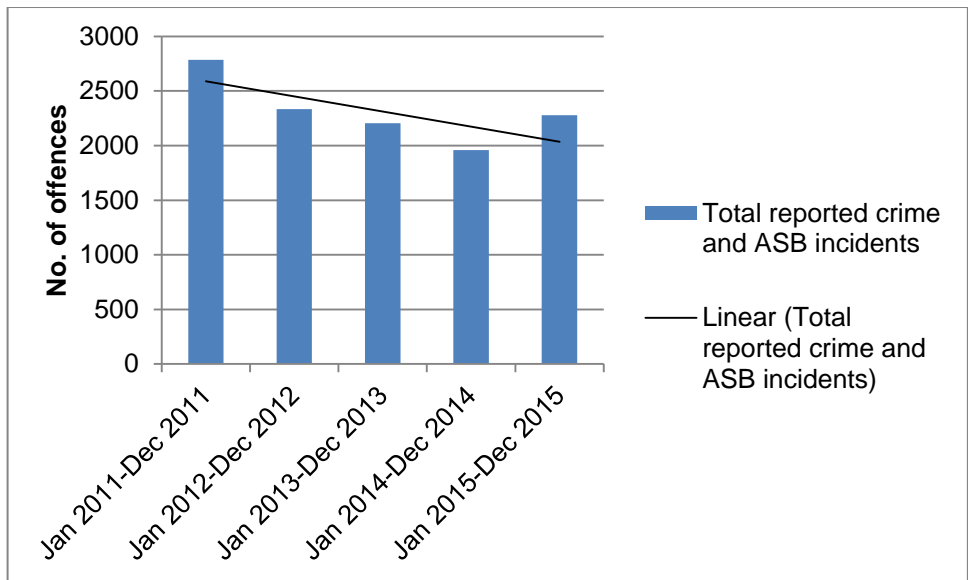


Figure 22: Crime and antisocial behaviour (A SB) incidents in Waterloo North, 2011-2015

# 15. Waterlooville Town Centre:

## Conclusion

- 15.1 The retail overview at Section 13 and the analysis of Waterlooville town centre against the 11 NPPG performance indicators in Section 14 has led to several conclusions, which are summarised in the following paragraphs and SWOT analysis table.
- 15.2 The NPPG performance indicators suggest that Waterlooville town centre's economic health and vitality are remarkably strong considering the recent recession. This is reflected in:
- low vacancies in terms of proportion of overall floorspace, although comparatively higher in the central core of London Road/The Boulevard;
  - comparison and convenience floorspace above the national average; and
  - comparison retail floor space above the Local Plan target – this reflects the large size of the units at Wellington Retail Park as well as Asda in Portland Road, Waitrose in Dukes Walk and Wickes and Topps Tiles in Rockville Drive.
- 15.3 The town centre performs well against the other performance indicators including unit occupancy (above the national average), diversity of uses and pedestrian footfall. The town centre is also easily accessible via the A3 (M).
- 15.4 There is some evidence of polarisation of retail types with a significant concentration of multiple retailers and comparison A1 uses at the eastern end of the centre, within the primary shopping area and at Wellington Retail Park; whilst the town centre's western end is characterised by independent retailers. This could be seen as having created two successful areas – Wellington Retail Park and Dukes Walk flanking the less successful London Road, Wellington Way and Boulevard retail areas. Overall the centre is well served by a range of multiple and independent retailers.

<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Low overall vacancies across overall town centre, below national average.</li> <li>• Falling reported number of crime incidents since 2011, with slight increase in 2015.</li> <li>• The presence of retail parks in the town centre is comparatively rare and provides a range of additional large A1 floorspace to complement the smaller high street and precinct stores. Development of further A1 uses in retail parks within a town centre retail parks are also permissible under the NPPF.</li> <li>• Wide range of stores across the town centre including independents and multiples</li> <li>• Highly accessible by car from the A3(M) and bus from the A3 Zip Corridor, Plentiful free parking at Wellington Retail Park and at Asda.</li> <li>• Many car parking spaces available at car parks around the rest of the town centre, all within easy walking distance from the shops.</li> <li>• Falling rates of crime and antisocial behaviour in the town centre, partly as the result of neighbourhood policing initiatives.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Noticeably high concentrations of vacant units within certain parts of the centre (Wellington Way and The Boulevard)</li> <li>• Public realm weak across some parts of the town centre, with poor signposting and lack of public or civic open space or a square (will be addressed through further separate work on public realm and accessibility as part of a masterplan or updated policy framework for Waterlooville)</li> <li>• Primarily car and to a lesser extent bus, based accessibility putting reliance on car parking which can be busy.</li> <li>• Crime and antisocial behaviour still fairly high relative to some other parts of Hampshire.</li> </ul>
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Creation of a new square or other public open</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Fragmented land ownership within town centre</li> </ul>

<p>space area. The 2003 Urban Design Framework suggested the Asda car park, if Asda relocated outside of the town centre boundary. However, no indication this is likely so the other options include the bandstand Boulevard area, as an attractor to bridge the Wellington Retail Park and Dukes Walk disconnect.</p> <ul style="list-style-type: none"> <li>• Opportunity to increase pedestrian links between edge of centre sites (Wellington Retail Park, Asda) and the rest of the town centre through better signposting and other public realm improvements (will be addressed further through separate work on public realm and accessibility)</li> <li>• Opportunity to increase cultural, civic and leisure offer in the town centre as alternatives to A1 uses (an approach recommended in <i>Beyond Retail</i> (2013) and other national reports). This may require developer funding through CIL (and potentially Section 106 agreements) to improve public realm or provide new community facilities as part of individual or comprehensive schemes. A relaxation of the Local Plan policy approach for retail uses in parts of the centre that may be earmarked for regeneration could potentially assist with delivery of these alternative non-retail uses, or they could be encouraged through use of a Local Development Order. Both options would require further investigation.</li> <li>• Develop a more rounded day, evening and night-time mix of consumer and leisure attractions</li> <li>• Opportunity to revise the scale of parking charges at the Council-owned car parks to be more competitive and attractive to shoppers</li> <li>• Opportunity to capitalise on the substantial emerging retail market being presented by the major residential and mixed-use scheme being constructed at the West of Waterlooville MDA. This could provide considerable shopping trade for the town centre, particularly if regeneration takes place at the right pace and scale to attract new residents to shop there rather than at other competing centres. Regeneration of the town centre could be partly funded through the use of Section 106 agreements as part of the MDA scheme.</li> </ul>	<p>creating potential difficulties and/or delays in being able to effect large-scale positive changes through major redevelopment initiatives, particularly around the Asda Portland Road site.</p> <ul style="list-style-type: none"> <li>• Threat from online and multi-channel<sup>52</sup> shopping and recessionary impacts affecting all town and city centre high streets, particularly small and independent shops.</li> <li>• Continued competition from other town centres and retail parks, for example Whiteley, Gunwharf Quays and Fareham.</li> <li>• Risk that new residents of the MDA may travel elsewhere other than Waterlooville town centre to shop if regeneration in the town centre does not happen at the right pace and direction i.e. the right type of retail development and/or leisure offer to meet the latent demand from this development as well as from existing residents of Waterlooville (and/or other parts of Waterlooville's retail catchment area).</li> <li>• That the physical barriers of Maurepas Way fail to attract pedestrian visits from the MDA and the Wellington Way Retail Park to the town centre.</li> </ul>
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**Table 18: SWOT analysis of Waterlooville Town Centre retail environment and provision (Based on retail overview, NPPF performance indicators and separate research on car parking in Waterlooville)**

<sup>52</sup> Defined as the use of digital channels e.g. online stores, mobile apps and telephone sales, in addition to opportunities to browse and make purchases at physical 'bricks and mortar' stores.

# 16. Waterloo: Boundary Review

- 16.1 There are presently three related approved planning applications for a major development of retail and other town centre uses at BAE Systems Technology Park in Waterloo, to consist of non-food retail and/or leisure uses, a food store and a restaurant/drive-thru restaurant. The former BAE site is located outside of and some distance away from the original town centre, separated by residential and other non-town centre uses, and consists at present of mainly vacant buildings and a large car park. It is currently allocated within the Local Plan (Allocations) under policy WA2 (BD54) for economic development, hotel or leisure uses.
- 16.2 Due to its distance from the town centre and the other separating non-retail uses between it and the existing centre, the site does not form a natural extension to the town centre boundary. It would therefore be inappropriate to identify that area as town centre as the existing centre should be maintained to add to a core of diversity and attractiveness to the growing population of the area by adding a diversity of uses including leisure and night time economy. The site is within an established area for high-technology industries (Brambles Industrial Estate). The site has also been assessed within the Employment Land Review as being a suitable and well-located site for future employment development.
- 16.3 The car park to the west side of the site was promoted under the Call for Sites for the Employment Land Review for main town centre uses, including offices but given the proximity of other industries within the wider industrial area it also has some potential for advanced manufacturing. It is therefore important for the entire site to remain in commercial use.
- 16.4 It is considered that the most natural and effective approach to achieve a continued retail/leisure use at this site would be for the Council to maintain the Local Plan site allocation as part of its forthcoming Local Plan review – with some adjustments to the policy wording if the Council feels it is necessary to tighten it to restrict it to certain uses in order to address specific development needs. This would enable any future applications on the site to be considered subject to certain policy criteria. Policy BD54 presently allocates the site for economic development, hotel or leisure uses.
- 16.5 The existing boundary of Waterloo town centre appears to be working satisfactorily. There are no vacant units at the edge of the centre and most of the vacant units are presently clustered in the central shopping precincts (Wellington Way shopping centre and The Boulevard), which are designated as primary retail frontage. Although the proportion of vacant units in these frontages exceeds 25%, the clause within policy AL3 of the Local Plan (Allocations) would allow change of use of any units in one of these frontages to a non-A1 use if an application came forward.
- 16.6 This paper does not therefore propose to amend the town centre boundary or retail frontages – see table 19 below.

Street	Unit nos to remain in town centre	Unit nos to be deleted from town centre
No change	No change	No change

Table 19: Waterloo town centre – proposed boundary changes

# 17. Overall Conclusions and Recommendations

## Quantitative need for retail floorspace

- 17.1 National trends as described in section 5 indicate that most town centres have too much retail floorspace and of the wrong size and configuration to meet the needs of major multiple retailers, compete with out-of-centre developments and the trend for e-commerce and multi-channel shopping.
- 17.2 It will be necessary to consider retailer requirements for floor space in the town centres in the context of multi-channel shopping to ascertain the quantity of floor space that will be required to meet future demand post-2016.

## Qualitative need for retail uses

- 17.3 In order to deliver the new and reconfigured retail development that is likely to arise in future, it is essential that the Council works closely with the retail industry to better understand their property requirements. If retailers are looking to downsize due to an increase in multi-channel retailing, this could lead to additional availability of floor space that could provide opportunities for other town centre uses such as restaurants and bars, independent retailers, offices and leisure uses.
- 17.4 The Council will continue to monitor the levels of car parking within the town centres and their relationship to the dynamics of shopping patterns. Initial research into car parking in the town centres shows it is all well used, at various times and there is limited spare capacity. There remains an emphasis to promote modal shift to reduce reliance on the car but the character of the borough and our town centres is largely car based and so parking will remain a necessity. Where any opportunities to redevelop town centre sites arise then rationalisation of parking will be considered in the scheme to match parking with the needs of businesses that could be retail but could also include leisure or cultural attractions. Mixed use developments would encourage people to visit the town centres for a broad range of activities, at various times of day including the evenings, thereby increasing the centres' vibrancy and maximising their vitality (as well as perceptions of public safety) and making most effective use of parking areas.

## Recommendations

- 17.5 In addition to the opportunities highlighted in the SWOT analysis tables in sections 11 and 15, this study has also made several specific recommendations. These are reiterated below:
  - Seek a wider range of uses in addition to A1 shops, and consider combining this approach with public realm improvements in Havant and Waterlooville town centres to improve public space (including outdoor space and cafes) particularly if this can be achieved as part of comprehensive development, as is currently being proposed in Market Parade.
  - Consider the requirements of businesses whilst undertaking a Local Plan review to ensure that policies work to meet their floor space demands at the same time as



maximising viability of the town centres for future investors and maximising public footfall and spending within the town centre, particularly the east side of Havant town centre, including West Street and the Meridian Centre, and in Waterlooville's older shopping centres.

- Amend the Havant town centre boundary to reduce the length of East Street that falls within it, as proposed in section 12, to a) consolidate the town centre in line with the shift in the national retail market towards smaller town centres (discussed in section 5); and b) help channel applications for new retail units into the western part of East Street, where there are relatively high vacancies compared to the rest of the town centre, and into other parts of the centre.
- Maintain the existing frontages and the A1 concentration tests in policy AL3 of the Local Plan (Allocations) for primary and secondary shopping frontages.
- Continue to monitor applications for change of use to ensure policy AL3 continues to allow non-A1 uses in frontages where it is appropriate; whilst maintaining a reasonable proportion of A1 uses in accordance with the policy. If necessary, consider adjusting the proportion of A1 units or vacancy threshold within Policy AL3 as part of a future Local Plan review if necessary to maintain vital and viable town centres.
- Continue to monitor footfall in Havant and Waterlooville town centres and district centres in the Borough on an annual basis to observe the impact of new developments at these centres and at competing nearby town centres and retail parks.
- Maintain the existing footfall count points for consistency but consider adding additional count points in future to take account of further new developments.
- Include an additional footfall count point at Solent Road retail park to monitor use of the retail park in addition to the count point at Park Road South (which shows footfall between the east side of the town centre and Solent Retail Park).
- Consider the potential for, and, in the case of Waterlooville, progress, targeted regeneration strategies to address underperforming parts of the centres, e.g. the Meridian Centre first floor, and Wellington Way shopping centre/The Boulevard. These strategies should be focussed on reducing vacancies in these areas and incentivising retail and/or leisure development that is viable and meets the Council's long-term aims. For the primary and secondary shopping frontages in Waterlooville that are identified in section 14 as significantly underperforming in terms of vacancy levels, consider options for comprehensive redevelopment of those areas as part of the centres' overall regeneration strategy.
- Site specific plans or Local Development Orders for East Street or any other area should take into account of the surveys undertaken by the Council in 2012 as well as consider the needs of businesses for floor space and how these fit with the ideal of a compact town centre, as recommended in *Beyond Retail*. They could also involve proactive use of compulsory purchase orders, as recommended in the *Portas Review*, to enable redevelopment of key and underutilised space.
- Develop Compulsory Purchase order skills to take forward sites that are critical to town centre regeneration but have not progressed due to multiple ownership and land value expectation issues.

- Consider and progress potential options for creating new retail floorspace on car parking land, e.g. in Bulbeck Road, through current and future discussions with the owners of these sites or buildings. Also consider discussing any proposed redevelopment plans with local businesses and residents that use these car parks on a permit basis for long-stay parking to identify the level of impacts on them.

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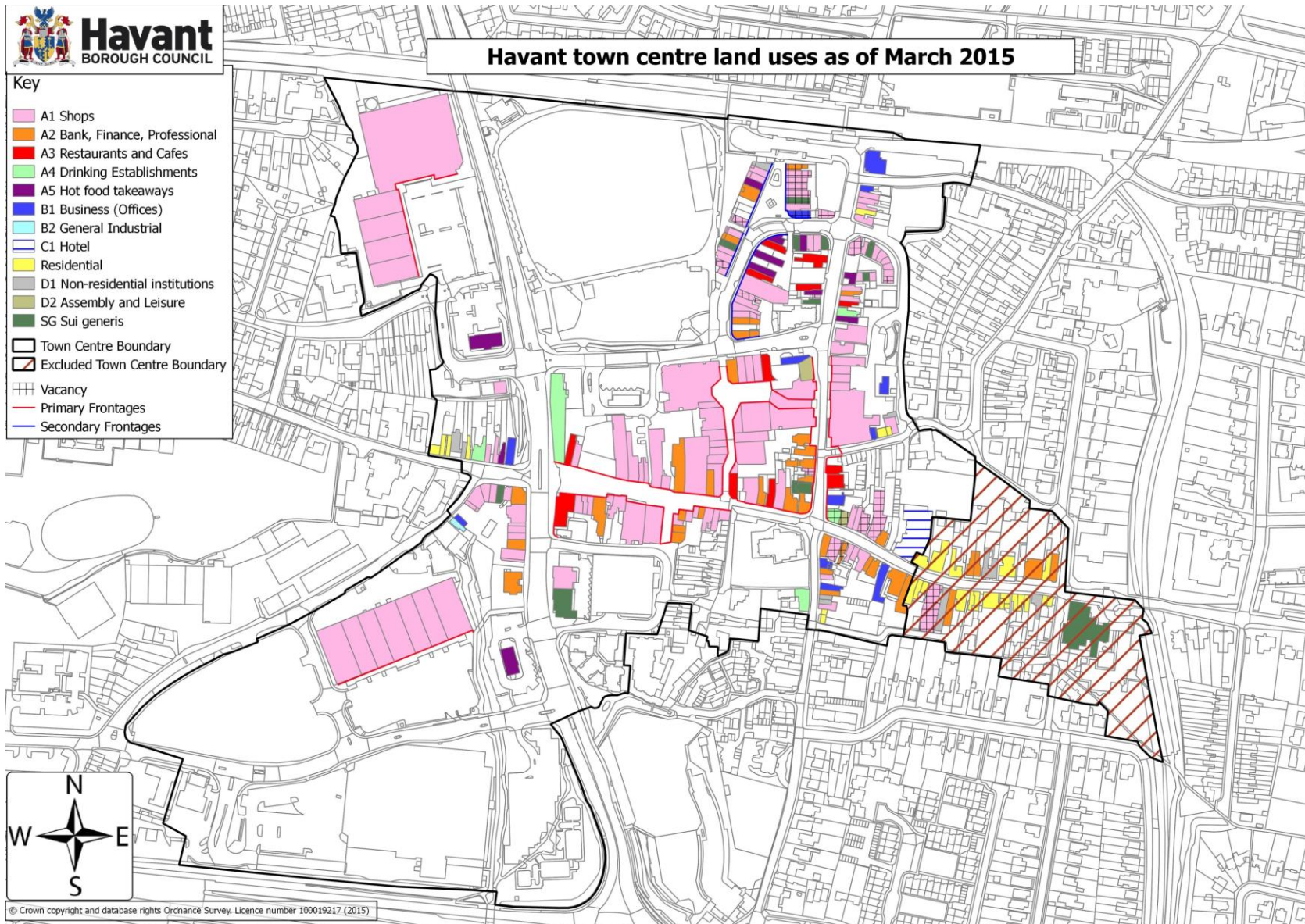
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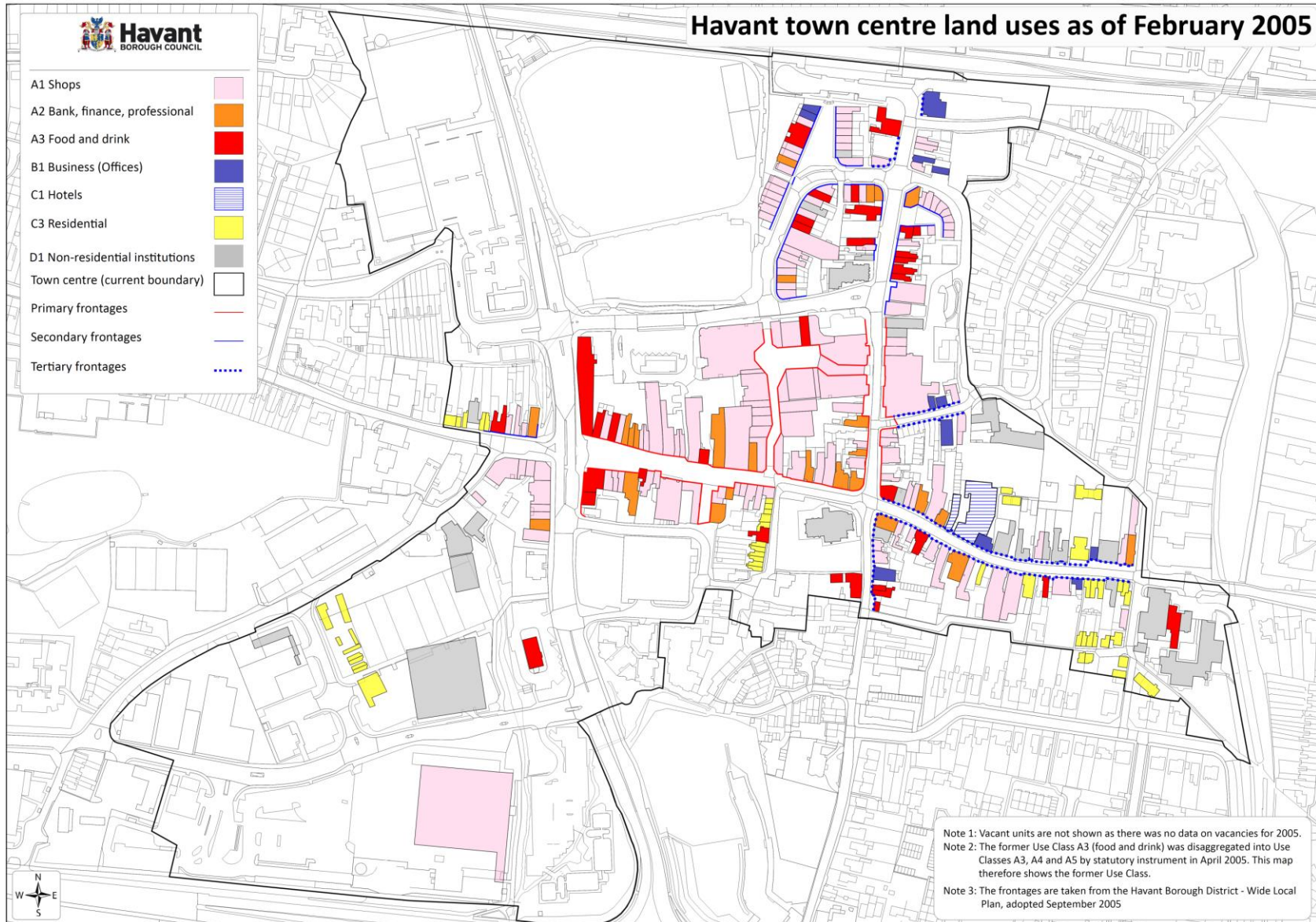
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# Appendix 1





# Appendix 2





# Appendix 3

