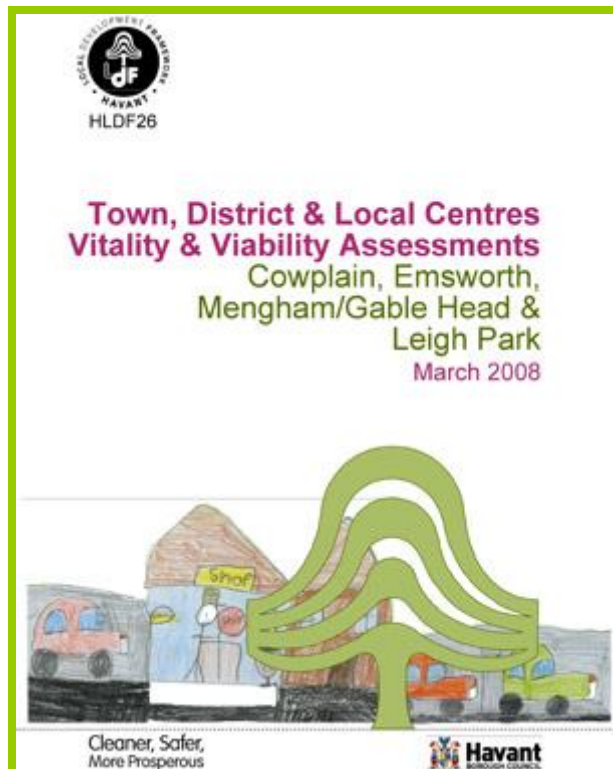


Town, District and Local Centres Vitality and Viability Assessments

Cowplain, Emsworth, Mengham/Gable Head and Leigh Park District Centre

HLDF 26

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Foreword

This background paper provides information for monitoring purposes in relation to the retailing policies contained in the adopted Havant Borough District Wide Local Plan (HBDWLP) which will remain in force until September 2008. The background paper also provides data to help inform the preparation of future local plan policies.

Cover: With thanks to Bidbury Mead Junior School

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1. SURVEY OVERVIEW

- 1.1 During July and August 2006, a survey of Emsworth, Cowplain and Mengham/Gable Head District Centres was carried out. This survey up-dated a previous survey carried out in 2003. This report sets out the results of the survey and the data collected is set out in tabular form at Appendices I – IV (only available as paper copies. Please contact the Planning Policy Team on 023 92446539 to purchase a copy of the background paper including appendices) The data in respect of Leigh Park District Centre was extracted from an Experian Goad Centre Report which was based on a survey undertaken by that company in 2007.
- 1.2 Section 2 of the Paper describes the performance indicators used in the assessments and Sections 3 – 6 examine each centre against the suite of performance indicators described in Section 2. Conclusions are set out in Section 7.
- 1.3 The key findings of the survey were as follows:-

Emsworth

Despite a drop in pedestrian flows this centre remains the most vital and viable shopping centre in the borough. Class A1 representation falls within the acceptable limits set by local plan policies, the vacancy rate is well below the national average and rents have increased along the primary frontages.

Cowplain

The improving signs of economic recovery detected in 2003 have continued and this centre can now be considered to be in a reasonable state of economic health. The centre enjoys a zero vacancy rate and rental levels have increased accordingly. Class A1 representation remains low.

Mengham/Gable Head

This centre remains in a reasonable state of health. The centre possesses excellent Class A1 representation and the vacancy rate remains below the national average. Whilst pedestrian flows have fallen, rental levels have risen.

Leigh Park

The 2003 survey revealed a centre in decline. This latest survey confirms that the decline has continued despite local initiatives aimed at reducing the long term, high vacancy rate. Class A1 representation has fallen as have rental levels along the primary frontages. On the up-side pedestrian flows have increased.

2. Health Check Performance Indicators

2.1 Under the provisions of the Planning and Compulsory Purchase Act 2004, local planning authorities are required to submit Annual Monitoring Reports to the Secretary of State. Among matters which the reports must cover are performance against defined core output indicators and where policies are not being implemented the reasons why and the measures proposed to secure implementation. For the purposes of this report the principal retail local plan policies that are monitored are set out in the Monitoring and Targets Schedule of the HBDWLP and are as follows:

- TC1 – Hierarchy of Centres
- TC2 – Maintenance and Enhancement of Centres
- TC8 – Changes of Use – Primary Frontages
- TC9 – Changes of Use – Secondary Frontages

2.2 The government specifically require the following matters should be kept under regular review:

- The network and hierarchy of centres
- The need for further development
- The vitality and viability of centres

The network and hierarchy of centres is set out in Policy S1 of the Hampshire County Structure Plan (Review) and Policy TC1 of the HBDWLP . The need for further development to 2006 is set out in Background Papers Nos. 10 and 11 (Comparison and Convenience Floorspace Retail Study 2001-2006). This report deals with the issue of vitality and viability in respect of the borough's four district centres. The centres of Havant and Waterlooville were covered in Background Paper 2/10 November 2005.

2.3 According to para. 4.4 of PPS 6 in order to measure the vitality and viability of town centres and how this is changing over time, local authorities should regularly collect information, preferably in co-operation with the private sector. The 12 key indicators for measuring vitality and viability are set out in para. 4.4 of PPS 6. For reasons of expediency and cost the Council does not monitor all the indicators described. Nevertheless, it is considered that the 6 indicators used provide a sound basis for the town centre health checks. The indicators are as follows:

Non-Food Market Share Rates

2.4 The council regularly conducts household shopping surveys to establish shopping centre patronage rates and general shopping habits. These surveys are also helpful in identifying leakage of expenditure to competing centres located outside the borough. The range and mix of non-food shops available within a centre are the main factors which determine a centre's position in the retail hierarchy. As such, it is normal to expect shoppers buying comparison

goods to use these centres which offer the greatest choice in terms of both the ranges of goods and national multiple retailers. Upward movement to market share rates resulting from increased patronage by local residents can be achieved by the introduction of new retail floorspace designed to attract national multiple retailers. The council has set a target of 48.5% collective market share for all the borough's town and district centres, at 2005. Havant and Waterlooville Town Centres will contribute the lion's share towards that target.

Public Perception Ratings

- 2.5 The household shopping surveys ask residents to score the Borough's centres as either *good*, *average* or *poor* in relation to a series of shopping and environmental indicators. The centres' scores are obtained by adding the total of percentage responses and dividing by the number of indicators used. None of the perception indicators are weighted to enhance importance. Five shopping indicators are used covering the range of shops for non-food, range of shops for food, quality of goods, the price of goods compared with other centres and shopping centre opening hours.

Pedestrian Footfall

- 2.6 Footfall surveys are useful indicators in that they quantify how many people are in a shopping centre at any one time. Attracting customers is the most important factor behind the success of any shopping centre. Without shoppers passing through the centre, occupiers are likely to move away and this has a consequent impact on vitality and viability. The council has set a target to achieve an increase in the footfall in each centre.

Vacancy Rates

- 2.7 Vacancy levels can give a good indication of the overall health of a town or district centre. There may be a number of reasons why a particular centre has an above average vacancy rate but generally it is related to retail demand and where vacancy levels are moving upwards this would indicate a centre in decline. The council have set a target to achieve vacancy levels at the UK average or below the UK average. In January 2007 the UK unit average stood at 10%.

Class A1 Retail Representation

- 2.8 People visiting town centres do so primarily for shopping purposes and the level of attraction depends on the number and range of Class A1 units present. Maintaining the level of retail representation requires control over changes of use in the primary and secondary frontages. A target has been set to maintain a threshold of 60% representation of Class A1 retail in primary frontages and 40% in secondary frontages.

Rental Levels

- 2.9 For the purposes of assessing vitality and viability, rental performance is also a good indicator of retail strength because it reflects perception of a town in trading terms. This is because retailers consider rent to reflect the margin between turnover and operational cost, plus profit. The better the perceived trading prospects the higher the rent a retailer will be prepared to pay to obtain representation in a centre.
- 2.10 The HBDWLP monitoring target is for Zone A rents to be maintained or increased within the primary shopping frontages. The Zone A rents included in this report relate to those primary frontages where the highest rents have been achieved. The rental information included in this report has been obtained from local firms of commercial surveyors who are commissioned bi-annually to carry out Zone A rent surveys of the principal shopping frontages for all the borough's centres.

3. EMSWORTH DISTRICT CENTRE

- 3.1 Emsworth is an historic centre which owes its existence to the establishment of the fishing port and its related boat building industry. Since the turn of the 20th century the importance of Emsworth as a fishing port has declined but its importance as a popular port of call with yachtsmen, artists and naturalists as well as tourist visitors, has increased. Nevertheless it has retained its role as a shopping centre serving the daily requirements of the wider settlement of Emsworth including the immediately adjoining parishes in West Sussex.
- 3.2 The shopping centre is defined as a district centre in Policy TC1 – Hierarchy of Centres in the Havant Borough District Wide Local Plan.(HBDWLP) The greatest concentration of units is now to be found south of the A259 along the High Street and around St Peter's Square where the primary frontages are located. The centre's only supermarket is a Co-op store and this is situated south of the A259 in North Street. Most of the retail outlets in the centre are occupied by local independent traders offering a range of convenience and comparison shopping. In total the district centre contains 92 units with a gross floorspace of 8,846 sq m (95,183 sq ft). Convenience retailers occupy 13% of all units and comparison retailers 43.5%. Service and vacant units comprise the remaining 43.5%. All retail categories are represented, with the exception of retailers selling footwear, sports, toys, hobbies and jewellery.

Non-Food Market Share

- 3.3 Emsworth's non-food market share has remained fairly static over recent years. In 1999 it was measured at 1.5% with a trade draw from its local catchment of 17.8%. In 2001 market share stood at 1.9% with a trade draw of 21.5% and when the last survey was undertaken in 2003 market share was 1.6% and a trade draw of 17.6%. Emsworth retains a loyal customer base which use the centre for comparison shopping as most goods can be purchased there with the exception of those mentioned in para 3.2. This is not expected to change despite new retail development on the edge of Havant Town Centre. It will only be possible to increase the centre's market share of expenditure generated locally if space can be provided for new retail development. However this is unlikely to happen as a centre is constrained by its historic street pattern and historic urban form.

Retail Representation

- 3.4 The primary shopping frontages are located along High Street and around St Peter's Square. There are two small secondary frontages adjoining the primary frontage in High Street.
- 3.5 The majority of shops in North Street are defined as secondary. There are two tertiary locations in this centre but they are not surveyed for monitoring purposes.

- 3.6 Since the 2003 survey was carried out a slight fall in Class A1 retail representation has occurred as a proportion of the total number of units, within the primary frontages. In 2003 64% of all units were classified as Class A1, but by 2006 this had fallen to 60%. However the actual number of outlets in the primary frontage has increased as a result of refurbishment/sub-division and there are now 43 units classified as Class A1 as opposed to 39 in 2003. Class A1 representation along the secondary frontages has also fallen by three units and now stands at 59% as opposed to 66% in 2003. Despite the fall in Class A1 representation within the primary frontages the 2006 levels are within the HBDWLP monitoring target to maintain a threshold of 60% representation in primary areas and 40% in secondary.
- 3.7 Retail representation, by trade category for the centre as a whole, shows convenience retailers over-represented compared with the UK average. However, when convenience representation is examined by floorspace, it mirrors the UK average due to the small size of shop units. For comparison shops Emsworth falls below the UK average of 56% with a centre profile of only 43%. The floorspace profile is worse with comparison shops occupying only 33% of the floorspace compared with the UK average of 57%. The disparity is also due to the small size of shops in the centre. As has been pointed out in para 3.2 there are some trades not represented and this was partly accounted for by the low unit and floorspace profile. A further reason for this is the presence of a high number of catering uses and estate agents which have taken space formerly occupied by Class A1 retailers. However the high number of non-retail uses has not dented the centre's rating as a good place to shop and visit.

Proportion of Vacant Shops/Units

- 3.8 The vacancy rate data included in this report has been obtained from a field survey conducted on 12 July 2006. This survey showed five units vacant out of 92 representing a 5% vacancy rate. At the time the survey was undertaken the UK average stood at 10% and therefore Emsworth can be considered an out-performing centre in comparison to other centres in the UK and therefore meets the HBDWLP monitoring target for vacancy level profiles to match or beat the UK average.

Public Perception Rating Scores 2001 and 2003

Indicator	2003 Score	2001 Score	% Change + or -
Range of shops - food	57.1	36.5	+ 56.4%
Range of shops - non-food	22.9	18.0	+ 27.2%
Total Combined	80.0	54.5	+ 46.7%

- 3.9 The table above shows that the public's perception of food and non-food shopping facilities increased overall by 46%. This large increase is mainly attributable to a big improvement in the food rating of 56%. There is no

obvious reason for the improvement as in fact the number of food shops declined from 14 to 12 between 2001 and 2003. However the unit count profile for food shop representation exceeds the UK national average and many of the small food shops are independently owned and therefore offer a more personal service. It remains the best rated centre in the Borough for its general shopping environment and range of facilities available. It is also rated the best centre in the Borough for its appearance and character. This is mainly due to the large number of old and listed buildings located around St Peter's Square and along the High Street.

Pedestrian Flows

3.10 The 2006 pedestrian flow count was undertaken on Friday 4 August and Saturday 5 August between 10.00 am and 4.00 pm. Counts were undertaken at five locations within the centre. The weather on Friday was cloudy but warm. On Saturday the weather was warm and sunny. The total weekly equivalent number (WEN) for all locations amounted to 46,215 persons, a slight increase on the 2003 figure (+ 0.8%) which stood at 45,827. The highest pedestrian flows were recorded outside 15 High Street (Nat West Bank) and the lowest at 17 North Street (Tesco Express). There was a recorded fall of 16% outside NatWest Bank and this figure therefore contravenes the HBDWLP monitoring target for an increase in footfall at the 100% pitch.

Rents

3.11 The average rent for premises situated along the 100% pitch (along the High Street where the highest pedestrian flows are recorded) is £269 per sq m. The rents have increased from £237 per sq m in 2003 to £269 per sq m. This represents a 14% rise in rents between 2003 and 2006 and is in line with the increases measured for some of the other indicators included in this report. The increase meets the HBDWLP monitoring target for Zone A rents to be maintained or increased along the primary frontages.

4. COWPLAIN DISTRICT CENTRE

- 4.1 Cowplain Shopping Centre is located approximately two kilometres north of Waterlooville Town Centre, on London Road. The centre has grown since the Second World War to serve the residential areas which have been developed in the north of the district. It is the smallest of the Borough's four district centres but its catchment area includes parts of Winchester's and East Hampshire's outlying parishes.
- 4.2 The shopping centre is defined as a district centre in Policy TC1 of the HBDWLP. All the units in this centre are located on the west side of London Road between Sylvester Road and Summerhill Road. The centre contains two supermarkets. The largest is a Lidl Supermarket which replaced Waitrose when it relocated to Waterlooville Town Centre in 2001 and a smaller Co-op, located at the northern end of the centre. Most of the smaller retail outlets in the centre are occupied by local independent traders offering a range of comparison and service-sector shopping. In total, the district centre contains thirty-nine units with a gross floorspace of 6,841 sq m (75,672 sq ft). Convenience retailers occupy 13% of all units and comparison retailers 46%. Service units comprise the remaining 41%. As this is a small centre, there are a number of retail categories not represented, these being footwear and repair, mens and boyswear, mixed general clothing, books and crafts, gifts, china and leather goods, travel agents, jewellers, charity and pet shops.

Non-Food Market Share

- 4.3 Cowplain has a very low market share for non-food shopping. In 2001, its share stood at 0.3% but rose to 0.5% in 2003. However, statistical error would account for the relatively large rise recorded, i.e. 56%. Cowplain's market share is the lowest recorded of any of the four district centres. The figure corresponds with its non-food floorspace which is the smallest of all the centres and stands at just half the UK average. Cowplain's non-food market share is predicted to remain at around 0.5% as this centre is not considered to be a centre where new, large scale retail development can be provided in, or on the edge of the centre. As Cowplain is not considered an important shopping centre for non-food shopping, it is unlikely to be affected by new retail developments on the edge of Havant Town Centre.
- 4.4 Despite its low market share for non-food shopping, Cowplain's vitality and viability is underpinned by its two supermarkets, Lidl and the Co-op. Collectively these two stores account for 2.3% of all food expenditure generated in the Borough. It is likely that these stores, particularly the Lidl store, attract expenditure from outside the Borough. Both supermarkets generate linked shopping trips which are of benefit to other businesses in this centre.

Retail Representation

- 4.5 The primary frontage is located along three separate and clearly defined parades broken up by two secondary parades. There are no tertiary frontages in this centre because of its size and compact nature. This survey counted 39 units within the district centre as a whole. Of these, 26 (67%) are located within primary frontages and 13 (33%) are located within the secondary frontages. This latest survey has revealed a slight fall in Class A1 retail representation within the primary frontages. In 2003, 61% of all units were classified as Class A1 but by 2006 this had fallen to 58%. Class A1 representation along secondary frontages has also fallen from 50% to 46%.
- 4.6 Retail representation by trade category for the centre as a whole shows convenience retailers over represented compared with other UK shopping centres. The floorspace occupied by convenience retailers is also twice the UK average. This is due to the fact that this small centre contains two supermarkets which is unusual for a district centre comprising only 39 units. The Lidl supermarket is mainly responsible for raising the centre's base floorspace profile as compared to the national average.
- 4.7 For comparison shops Cowplain falls below the UK average with only 46% of shop occupied by comparison goods retailers. The comparison floorspace profile is also poor and is slightly worse than that of the unit profile with only 32% of the total floorspace in comparison use. There are a large number of small units and these account for the disparity.
- 4.8 For service sector uses the centre contains a high number of catering, financial services and estate agents. Units occupied by service sectors businesses make up 41% of all units and 28% of all floorspace. The high number of service sector users is responsible for this centre having no vacant units when the 2006 survey was undertaken. However the Class A1 figure within the primary frontages now stands at 58% and therefore contravenes the HBDWLP monitoring target to maintain a threshold of 60% representation in primary areas. Class A1 representation along the secondary frontages stands at 46% and therefore meets the HBDWLP monitoring target to maintain to 40% threshold in secondary areas.

Proportion of Vacant Shops/Units

- 4.9 The vacancy rate data included in this report has been obtained from a field survey conducted on the 11 July 2006. When the survey was carried out no units were recorded as being vacant. In 2003 four units were vacant. For the centre to have zero vacant rate is extremely unusual and is an indication that the demand for units is strong. A zero vacancy rate meets the HBDWLP monitoring target for vacancy level profiles to match or beat the UK average.

Public Perception Rating Scores 2001 and 2003

Indicator	2003 Score	2001 Score	% Changes +or -
Range of shops – food	6.3	7.7	-18.2
Range of shops – non-food	0.0	0.0	0
Total Combined	6.3	7.7	-18.2

- 4.10 The table above shows that the public's perception of food shopping facilities fell by 18.2% between 2001 and 2003. This is likely to have been caused by the relocation of Waitrose to Waterlooville Town Centre in 2001 which was a major blow to the fortunes of the centre. As mentioned previously Lidl re-occupied the unit vacated by Waitrose and are now well established in this district centre.
- 4.11 The fact that comparison shops occupy only 46% of all units, which is well below the national average profile compared with other UK centres, explains why no local resident gave this centre a "good" rating for the range of non-food shops. There are a substantial number of trade categories not represented in this centre as described in paragraph 4.2 and this would also help to explain the zero perception rating score. Cowplain's residents choose to shop else where for comparison goods, with almost 50% regularly shopping in Waterlooville Town Centre and nearly a quarter regularly shopping in Portsmouth.

Pedestrian Flows

- 4.12 The 2006 pedestrian flow counts were undertaken on Friday 28 July and Saturday 29 July between 10am and 4pm. Counts were undertaken at four locations within the centre. The weather on Friday was clear, warm and sunny. On Saturday it was warm with patchy cloud but it turned cooler in the afternoon with drizzle. The total weekly equivalent number (WEN) for all locations amounted to 18,038 persons a fall on the 2003 figures of 15%. The highest pedestrian flow was recorded outside 3/4 Fernwood House (O Sole Mio) and lowest at 33 London Road (Lidl). Pedestrian flows in this centre have been declining steadily ever since the first survey was conducted in 1999. As there was a recorded 10% decline outside O Sole Mio this contravened the HBDWLP monitoring target which seeks an increase in footfall at the 100% pitch.

Rents

- 4.13 The average Zone A rent for premises situated along the 100% pitch (the primary frontages) is £215 per sq m. The rent increased from £162 per sq m in 2003. This represents a 33% rise and meets the HBDWLP monitoring target for Zone A rents to be maintained or increased along the primary frontages.

5. MENGHAM AND GABLE HEAD DISTRICT CENTRE

- 5.1 Mengham and Gable Head are twin centres located at the southern end of Hayling Island in a predominately residential area. They comprise two centres linked by a classified road, the C426 Elm Grove. Mengham is the principal shopping centre on Hayling Island and comprises 63 units. Gable Head is a smaller centre comprising 32 units. Both centres were developed during the 1960s and 70s and have expanded to meet the demands of a larger resident population and the summertime holiday trade. Mengham is anchored by a Somerfield supermarket and Gable Head by a Co-op supermarket.
- 5.2 The twin centre is defined as a district centre in Policy TC1 of the HBDWLP. The greatest concentration of units is found on the east side of Elm Grove both at Mengham and Gable Head. Most of the retail outlets in the centre are occupied by local independent traders offering a range of convenience and comparison shopping. In total the district centre comprises 95 units with a gross floorspace of 9,536 sq m (102,645 sq ft). Convenience retailers occupy 9.5% of all units and comparison retailers 55.8%. Service and vacant units comprise the remaining 34.7%. All retail categories are represented with the exception of off licences and travel agents.

Non-Food Market Share

- 5.3 The district centre attracts a low Borough market share of 2.5% as recorded in 2003. This was a rise on the 2001 figure of 2.2%. However the trade draw from the island itself has remained fairly static at around 14%. Very few shoppers travel to the island to carry out their weekly comparison shopping. Both centres benefit from holiday summer trade but this has not been measured in economic terms. It is clear from the above market share figures that the majority of the island's residents travel off the island to do their main comparison shopping. The 2003 survey revealed that the most popular shopping centres were Chichester City Centre (22%), Havant Town Centre (21%) and Portsmouth City Centre (18%). Because both Mengham and Gable Head centres are hemmed in by residential development it is difficult to create space for expansion which would increase their retail offer.

Retail Representation

- 5.4 The primary frontages in Mengham are located along the west and east sides of Elm Grove and along the north and south sides of Mengham Road. There is a short section of secondary frontages at the eastern end of Mengham Road and a section of tertiary frontage on the eastern side of Elm Grove between the last primary frontage and the District Centre boundary. At Gable Head the primary frontages are located on the east side of Elm Grove and the secondary frontages are located to the north and south of the primary frontages together with two small secondary parades either side of the Hayling Billy Public House. The twin centre as a whole includes 95 units. Of these, 86 units are located within the primary and secondary frontages. 59

units (69%) are located within the primary frontage and 27 (31%) are located in the secondary frontages. This latest survey has revealed a slight fall in Class A1 representation within the primary frontages. In 2003 77% of all units were classified as Class A1 but by 2006 this had fallen to 73%. By contrast Class A1 representation along the secondary frontages had risen from 73% to 89%. As Class A1 representation stands at 73% in the primary frontages and 89% in the secondary, these levels meet the HBDWLP monitoring target to maintain a threshold of 60% representation in primary areas and 40% in secondary locations.

- 5.5 Retail representation by trade category for both centres shows that convenience retailers match the UK average. However the floorspace occupied by convenience retailers exceeds the UK average and this is due to the fact that two of the nine convenience retailers are supermarket operators, who account for the majority of the centre's convenience floorspace.
- 5.6 For comparison shops the twin centre is in line with the UK average with 53 shops occupied by comparison retailers. The twin centre falls below the UK average for its floorspace profile by 13% due to the high number of small shop units.
- 5.7 For service sector uses the twin centre is under represented in the restaurants, cafes and fast food category but over represented by financial services outlets and estates agents.

Proportion of Vacant Shops/Units

- 5.8 The vacancy rate data included in this report has been obtained from a field survey conducted on 19 July 2006. When the survey was carried out 7 units (7%) were recorded as being vacant which is below the UK average of 10%. In 2003, 8 units were vacant. A vacancy rate of 7%, meets the HBDWLP monitoring target for vacancy profits to match or beat the UK average.

Public Perception Rating Scores 2001 and 2003

Indicator	2003 Score	2001 Score	% change + or -
Range of Shops - food	31.3	20.6	+51.9
Range of Shops - non-food	17.5	13.0	+34.6
Total Combined	48.8	33.6	+45.2

- 5.9 The table above shows that the public's perception of shopping facilities rose by some 45% between 2001 and 2003. There is no obvious reason for this rise other than the possibility that local initiatives by individual retailers aimed at improving the quality of their offer have impacted on the public's perception of the centre. In terms of the retail offer the twin centre provides a complete range of services with the exception of travel agents and off-licences. The convenience offer matches the UK profile of 9.2% and the comparison offer falls just below the UK average with 56% of all units within this category.

Pedestrian Flows

5.10 The 2006 pedestrian flow counts were undertaken on Friday 11 August and Saturday 12 August. The weather on Friday was cloudy and cool in the morning but warmed up with sunny spells in the afternoon. The weather on Saturday was similar to that on Friday. The total weekly equivalent number (WEN) for all locations amounted to 45,413 persons, a fall on the 2003 figure of 22.5%. The highest pedestrian flow was recorded outside 9/11 Mengham Road (Lloyds Pharmacy) and lowest outside 106 Elm Grove (Tesco Express). There was a recorded fall of 28% outside Lloyds Pharmacy and this figure therefore contravenes the HBDWLP monitoring target for an increase in footfall at the 100% pitch.

Rents

5.11 The average Zone A rent for premises situated along the 100% pitch (the primary frontage) is £242 per sq m. The rent has increased from £215 per sq m in 2003. This represents a 13% rise and meets the HBDWLP monitoring target for Zone A rents to be maintained or increased along the primary frontages.

6. LEIGH PARK DISTRICT CENTRE

6.1 Leigh Park District Centre provides shopping facilities for the extensive residential areas to the north and west of Havant. It is a purpose built centre, constructed as part of the post-war expansion of Havant in the 1950s and 1960s to meet the slum clearance and over-spill housing needs of Portsmouth. It is a fully pedestrianised centre surrounded by extensive surface level public car parks. Its retail offer is orientated towards meeting the day-to-day convenience and lower order comparison shopping needs of its immediate catchment area. The centre is built in a U-shaped form. The principal retail elements of the centre are located in two parallel precincts with a narrow mall which connects the two at its western end. In total the district centre contains 85 units with a gross floorspace of 15,497 sq m (166,800 sq ft). Convenience retailers occupy 11.7% of all units and comparison retailers 48.2%. Service and vacant unit comprise the remaining 40%. The centre lacks representation in a number of retail categories namely men and boys wear, gifts, china and leather goods, florists, travel agents and jewellers.

Non-Food Market Share

6.2 The market share of expenditure captured by the district centre in 2003 was 5.9%. In 2001 the figure stood at 6.8% representing a 13% decline in market share over the intervening 2 years. In 2003 there were 65 Class A1 retail shops and by 2007 the total number had declined by 7 to 58. The centre's comparison Class A1 profile now stands at 47% whereas the UK profile for all centres is 55% and is a reflection of the poor retail offer and lack of certain retail categories outlined in para 6.1. The fall in market share is also a consequence of the competition from the rebuilt Asda/Walmart hypermarket. In 2001 the hypermarket's trade draw from the Leigh Park wards stood at 3.5% but by 2003 this had increased to 14.4% as a consequence of trading patterns becoming established, after the rebuilding of the store in 2001. It is now likely that the trade draw rate will have risen further since 2003.

Retail Representation

6.3 The primary frontages are located along both sides of Greywell and around Greywell Square. The secondary frontages are located along both sides of Park Parade and a short section of Greywell, which links with Park Parade. All the 85 units in the centre are located within either the primary or secondary frontages. Of these 42 (49%) are located within the primary frontages and 43 (51%) are located within the secondary frontages. Since the last survey was undertaken in 2003 there has been a fall in Class A1 retail representation within the primary frontages. In 2003, 83% of all units were classified as Class A1 but by 2007 this has fallen to 71%. This fall is partly attributable to the owners of Greywell amalgamating units to provide large retail shops which are more attractive to chain stores. Since 2003 4 units have been lost as a result of this process. In the secondary location Class A1 retail representation has risen from 61% to 65%. As the Class A1 figures stand at 71% in the primary frontages and in the secondary 65%, these meet the HBDWLP

monitoring target to maintain a threshold of 60% representation in primary areas and 40% in secondary.

- 6.4 Retail representation by trade category as a whole shows convenience retailers over represented compared to other shopping centres in the UK. Because of the incompatibility of the Experian Goad centre report with earlier reports it has not been possible to provide specific floorspace data for this centre at 2007. The unit profile data has been obtained from the 2007 Experian Goad Centre Map. The unit profile data for Class A1 shops shows the centre under represented compared with the UK average by some 14%. This is partly accounted for by the absence of certain trade categories as outlined in earlier paragraphs.

Proportion of Vacant Shops/Units

- 6.5 The vacancy rate data included in this report has been obtained from an Experian Goad centre report based on a field survey conducted on 15 January 2007. This survey showed that 15 units were vacant out of a total of 85 representing a vacancy rate of 17.5% which is well above the UK average. A 17.5% vacancy rate contravenes the HBDWLP monitoring target for vacancy level profiles to match or beat the UK average.

Public Perception Rating Scores 2001 and 2003

Indicator	2003 Score	2001 Score	% change + or -
Range of Shops - food	30.1	51.4	-41.4
Range of Shops - non-food	8.4	7.5	+12.0
Total Combined	38.5	58.9	-34.6

- 6.6 The above table shows the public's perception of the centre's shopping facilities has dropped significantly since 2001. One of the reasons for the decline is the reduced range of food shops. In 2001 Leigh Park District Centre was the highest rated centre in the Borough for its range of food shops. Since 2001 two food shops, one of which was Kwik Save, closed down and this has impacted on the public's perception of the centre as a shopping destination. Nevertheless the centre's unit profile for convenience units remains above the UK average and this will be further enhanced once the new Lidl supermarket currently under construction is open for trading next year. Lidl are not currently represented in the centre and their new store, which will have a gross floor space of 1,286 sq m, will make an important contribution to the viability of the centre of the whole.
- 6.7 The public's perception of the centre as a comparison shopping destination improved by 12% despite a slight fall in the number of Class A1 shops and the competition faced by this centre from competing stores and nearby centres. The owners of Greywell have amalgamated a number of smaller units to create larger units and this has helped attract new retailers to the centre not previously represented.

Pedestrian Flows

- 6.8 The 2006 pedestrian flow counts were undertaken on Friday 25 August and Saturday 26 August. The weather on Friday was warm and again on Saturday, except for a shower in the afternoon. The total weekly equivalent number (WEN) for all locations amounted to 61,575 persons, a rise on the 2004 figure of 18%. The highest pedestrian flow is recorded outside 79-81 Greywell East (Tesco) and the lowest outside 35 Park Parade (Numark Pharmacy). Despite the rise recorded in 2006 pedestrian flows have declined in the centre since 2000 by 27% when the WEN stood at 85,016 persons. Nevertheless the latest survey shows an 18% increase in footfall outside Tesco and therefore meets the HBDWLP monitoring target for an increase in footfall at the 100% pitch.

Rents

- 6.9 The average Zone A rent for premises situated along the 100% pitch (along Greywell East where the highest pedestrian flows are recorded) is £242 per sq m. The rents have decreased from £323 per sq m in 2004 when the previous rental tone survey was undertaken. This represents a 25% decline in headline rents, a negative figure which contravenes the HBDWLP monitoring target that Zone A rent should be maintained or increased within the primary shopping frontages.

7. OVERALL CONCLUSIONS

- 7.1 The table at paragraph 7.3 sets out the monitoring data for each centre. Non-food market shared data has been omitted as the HBDWLP monitoring target is a global figure for all the Borough's centres. Individual targets were not set out for each centre. As at 2003 the collective market shares for all the Borough's town and district centres amounted to 43.5%. The target set out in the HBDWLP is for a collective market share of 48.5% at 2011 and was based on an estimated increase in market share arising from new retail floorspace planned for Havant Town Centre. This floorspace has now been constructed, although not all the units created have been occupied. Until the units have been occupied and a period of trading consolidation allowed for, usually 6-12 months, it will not be possible to establish what uplift in market share has occurred. It is expected that by the middle of 2008 it will be possible to carry out a Borough-wide household survey which will provide up-to-date data on market shares.
- 7.2 A new household survey will also provide data on changes to market shares for the four district centres covered in this report. It is expected that the individual market shares are unlikely to change significantly because as has been mentioned elsewhere in this report, that apart from Leigh Park District Centre, none of the other three district centres have any room for expansion, which would create space for new retail floorspace. It is more likely that the 2003 market share figures will remain unchanged except possibly for Leigh Park District Centre, which is the centre most likely to suffer from trade diversion arising from the new retail development that has taken place on the edge of Havant Town Centre.

CENTRE	CLASS A1		VACANCY RATE PROFILE %	PEDESTRIAN FLOWS + OR - %	RENTAL TONE ZONE A + OR - %
	PRIMARY %	SECONDARY %			
Emsworth	60	59	10	-16	+14
Cowplain	58	46	0	-10	+33
Mengham/Gable Head	73	89	7	-28	+13
Leigh Park	71	65	18	+18	-25

- 7.3 This table summarises the monitoring data so that the quantitative performance of individual centres can be compared at a glance. It can be seen from the table that Mengham/Gable Head has the highest proportion of Class A1 shops in both primary and secondary locations and Cowplain the least. Leigh Park has the highest vacancy rate and Cowplain the lowest. Leigh Park has seen the greatest increase in pedestrian flows at the 100% pitch and Mengham/Gable Head the greatest reduction. Leigh Park has suffered a fall in Zone A rental values and Cowplain has seen the greatest rise.

7.4 Some of the monitoring data included in this report is contradictory. To take Leigh Park for example, the centre has seen an uplift in pedestrian flows at the 100% pitch but a decline in rents and a stubbornly high vacancy rate. The stark data set out in the table needs to be put into context and the following paragraphs include a more general assessment with suggestions as to how the vitality and viability of these centres can be improved.

Emsworth District Centre

7.5 Emsworth District Centre has maintained its role as a small shopping centre with a pleasant village atmosphere. The shops are well supported by the local community and additional trade is attracted from tourists, particularly during the summer months. There are a high proportion of independent traders relative to local and national multiples. The Clon Town Britain survey 2005 acknowledged that Emsworth had fared better than most small towns being rated in the top ten of 103 “Home Towns” surveyed in England. “Home Towns” are defined as those retaining the most local identity. The shops in the centre provide a reasonable range of comparison and convenience goods and there is also a good range of banking and financial services. Emsworth is particularly well known for its extensive range of restaurants, cafes and public houses which underpin the vitality and viability of its night time economy.

7.6 In summary 3 of the 5 key performance indicators show up side trends as follows:

Public Perception

There has been a 46% rise in the public’s perception of the centre’s food and non-food shopping facilities.

Vacancy Rate

The vacancy rate of 5% remains well below the average of 10% for the UK.

Rental Tone

Headline Zone Rents have increased by 14% within the primary frontage at the 100% pitch.

Two indicators can be considered neutral as follows:

Retail Representation

There has been a slight fall in Class A1 representation within both the primary and secondary locations.

Pedestrian Flows

A 16% decrease in pedestrian flows at the 100% pitch. (It should be noted that the WEN for the centre as a whole showed a slight increase of +0.8%).

7.7 The evidence from this survey shows that Emsworth continues to be a vital and viable centre. Local residents rate Emsworth as the best centre in the Borough for its appearance and character. Its old world charm and village like

atmosphere add to the ambience of the centre. The only note of concern relates to the level of Class A1 representation along the primary frontage which has fallen to 60%. This position now needs to be carefully monitored in relation to the application of Policy TC6 - Changes of Use - Primary Frontages. The level of Class A1 representation in relation to secondary frontages will continue to be controlled by Policy TC7 - Changes of Use - Secondary Frontages.

Cowplain District Centre

- 7.8 Cowplain is the smallest of the Borough's 4 district centres. It has a small range of comparison shops and therefore is not considered to be a significant non-food shopping designation. The centre provides essentially a top-up shopping role and has a range of financial and retail outlets which help maintain the viability of the centre. Previous surveys have revealed signs of improving economic health and this latest survey confirms this trend. In summary, two of the performance indicators show up side trends as follows:

Vacancy Rate

This centre has a zero vacancy rate which is indicative of the healthy demand for units from retailers and service sector operators. This is the first centre in the Borough to have no vacant units available for acquisition or leasing since the vitality and viability monitoring surveys were first undertaken in 1999.

Rental Tone

Headline Zone A rents increased by 33% within the primary frontages at the 100% pitch. This centre enjoyed the greatest rise in rents and this has a direct correlation with the vacancy rate indicator.

One indicator can be considered neutral as follows:

Class A1 Representation

There has been a slight fall in Class A1 representation within the primary and secondary frontages.

Two indicators show a downward trend as follows:-

Pedestrian Flows

There has been a 10% fall in pedestrian flows at the 100% pitch.

Public Perception

There has been an 18% decline in the public's perception of the centre's food and non-food shopping facilities.

- 7.9 This centre continues to improve its vitality and viability rating. The vacancy rate has fallen to zero which is extremely unusual. Most UK shopping centres always contain some vacant units arising from property transactions and refurbishments. The zero vacancy rate profile has, however only been achieved by reducing Class A1 retail representation in the primary and secondary locations. In fact Class A1 retail representation along the primary

frontages has fallen below the 60% minimum threshold set by Policy TC6 Changes of Use – Primary Frontages and now stands at 58%. To ensure the level of Class A1 representation does not fall further the provisions of Policy TC6 will need to be strictly enforced. It is not proposed to alter the shopping frontage designations as this is unlikely to afford any greater protection to the existing Class A1 retail units.

7.10 The June 2004 report referred to the environmental problems affecting this centre namely noise, fumes and traffic disturbance. Despite the improvements being carried out in connection with the bus priority measures the centre continues to suffer from the affects of heavy traffic flows along the A3. As it will be extremely difficult, if not impossible to raise the centre's non-food market share thereby increasing footfall, it is essential that the public areas are improved. Whilst the implementation of physical improvements in themselves will not raise market share they will help retain the existing customer base essential for the continuing vitality and viability of this centre.

Mengham/Gable Head

7.11 The twin centre continues to provide a reasonable range of shopping and service facilities for the residents of south Hayling. The level of Class A1 retail representation in both primary and secondary locations is the highest of all the district centres. This is a reflection of the fact the majority of residents travel off the Island to carry out their higher level shopping but for those residents who cannot travel elsewhere or prefer to shop locally, this centre provides the best opportunity to cater for their needs.

7.12 In summary three of the five key performance indicators show up side trends as follows:-

Public Perception

There has been a 45% rise in the public's perception of the centre's food and non-food shopping facilities.

Vacancy Rate

There has been a fall in the vacancy rate and at 7% remains well below the UK average.

Rental Tone

Headline Zone A rents have increased by 13%.

One indicator can be considered neutral as follows:-

Class A1 Representation

There has been a slight fall in Class A1 representation along the primary locations but a rise in the secondary locations.

One indicator shows a downside trend as follows:-

Pedestrian Flows

There has been a 28% fall in pedestrian flows at the 100% pitch.

- 7.13 Due to the physical constraints imposed by the proximity of residential property in the centre it is not possible to allocate a site of sufficient size to accommodate significant retail development which would enhance retail offer. The main issue for the future of this centre is the promotion of environmental improvements directed at enhancing the shopping experience. A successful scheme was completed in 1998 along Mengham Road. The shopping frontages along Elm Grove could also benefit from similar treatment. This would help calm traffic movements and provide more space for tree planting and street furniture.

Leigh Park

- 7.14 Despite changes in ownership and initiatives aimed at boosting trade the vitality and viability of this centre continues to decline. The 2007 survey data which this report uses was collected before the new retail schemes built on the edge of Havant Town Centre opened for trade. Therefore the impact of these schemes on Leigh Park District Centre has yet to be measured. It can be assumed however that these schemes will have diverted trade from Leigh Park and further reduced the centre's economic health.

- 7.15 In summary four of the five key performance indicators show downside trends as follows:-

Public Perception

There has been a 41% fall in the public's perception of the centre's food shopping facilities but a 12% rise in the public's perception of the centre's non-food shopping facilities representing a 35% decline overall.

Vacancy Rate

The vacancy rate remains high at 18% and is well above the UK average.

Rental Tone

Headline Zone A rents have fallen by 25%.

Class A1 Representation

There has been a fall in Class A1 representation from 83% to 71% along the primary frontages but a slight rise along the secondary frontages from 61% to 65%.

One indicator shows an upside trend as follows:-

Pedestrian Flows

There has been a 33% rise in pedestrian flows at the 100% pitch.

- 7.16 The future role of this centre has been raised in the Leigh Park Strategic Framework, which was adopted as a Supplementary Planning Document on 26 July 2006. The following is an extract from para 5.7:-

“It is important to consider the role the Centre can play in the future of Leigh Park. A diversification of this Centre so that it comprises a mix of attractions rather than being mainly a place to shop needs to be considered”

Reference to “diversification” implies a reduction of the number of shops in Class A1 use. This could be achieved by increasing the number of non-retail uses which could strengthen the viability of the centre by concentrating the pool of available expenditure on a fewer number of shops. However there remains resistance to take-up of empty units, despite the fact there are trade categories where there is lack of representation. The latest survey shows that there are no laundrettes, dry cleaners, travel agents or estate agents. The centre also remains below the UK average for representation by restaurants, cafes and fast food take aways. Relying on service sector operators to take-up vacant Class A1 floorspace still remains an option but this is unlikely to significantly improve the centre’s vitality and viability or to bring about redevelopment.

- 7.17 Leigh Park District Centre is considered by the public to be the worst performing shopping centre in the Borough and is in desperate need of regeneration. (Leigh Park District Centre Public Perception Rating Table – Background Paper 2/9) It is unlikely that regeneration will be achieved by amending policies TC7 and TC8 of the HBDWLP in relation to the shopping frontage designations. However, if redevelopment can be achieved in the more vulnerable parts of the centre this will act as a catalyst for the refurbishment of the more viable areas, namely Greywell. There is public support for redevelopment as ascertained from the Core Strategy Issues and Options consultation carried out in August 2006. The majority of respondents were in favour of the redevelopment of parts of Park Parade (51.5%) with only 3% against. On the issue of shop numbers 35.7% were in favour of maintaining the existing number of shops, with 15.8% against.
- 7.18 The vitality and viability of the centre is constrained by the extensive inactive frontages. If the southern side of Park Parade were to be redeveloped this would enable the centre to be opened up so that the shops could be seen from Stockheath Road and Dunsbury Way. Redevelopment of the southern section of Park Parade would also create the opportunity to provide a bus station and market square. These initial design solutions were first explored at an Enquiry By Design event held during the Leigh Park Creating Quality Places project held in July 2003. These ideas have now been explored in greater detail by Roger Evans Associates, who in February 2007 were appointed by the Council to work in collaboration with the Planning Policy and Urban Design Team to produce an urban design framework for the centre. A draft urban design framework was published in October 2007 and is currently the subject of public consultation.
- 7.19 In the meantime small scale schemes will boost public confidence in the centre. Two schemes are currently underway, a Lidl supermarket on Somborne Drive and the redevelopment of the Greyhound PH to provide 29 flats with a bar/restaurant on the ground floor.

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