Town Centre Vitality and Viability Assessments, Havant and Waterlooville Town Centres

HLDF1

Background Paper No. 2/10

Foreword

This paper is one of a series of documents prepared as background to the preparation of the new Havant Borough District-Wide Local Plan and emerging Local Plan. This paper provides background information to inform the development of retailing policies in the new Plan. It also provides information for monitoring and development control purposes.

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1.0 SURVEY OVERVIEW

1.1 The information contained in this Background Paper has been sourced from Experian Goad Centre Reports and from data contained in an earlier Background Paper No. 2/5 (Town Centre Vitality and Viability Assessments Havant and Waterlooville Town Centres) January 2002. Other data has been obtained from in-house surveys and from work carried out by commercial surveyors in respect of rental levels. Section 2 of the Paper describes the performance indicators used in the assessments. Sections 3 and 4 examines each centre against the suite of performance indicators described in Section 2. The key findings of the survey were as follows.

HAVANT

1.2 Four of the six principal indicators of economic health indicate that Havant is an under-performing centre. Since 2001 market share has fallen, public perception ratings have declined, pedestrian flows have decreased and retail representation has fallen within the primary frontages. Whilst the vacancy rate has fallen it remains above the UK average. The only indicator showing a significant improvement is rental levels.

WATERLOOVILLE

1.3 Four of the six principal indicators of economic health indicate that the centre is performing well. Since 2001 market share has risen, public perception ratings have improved, the vacancy rate is below the UK average and rental levels have increased. There has, however, been a small decline in retail representation and pedestrian flows have decreased.

2.0 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 principle 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 two town centres.

2.3 According to para. 4.4 of PPS6 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 PPS6. 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. The perception tables used in this report includes a simple index system. This can be used as an effective gap analysis tool which is helpful in identifying strengths and weaknesses of a centre. A performance indicator that scores heavily above the average indicates out performance whereas an indicator that scores heavily below the average provides a clear indication that where possible, planning policy or town centre management measures need to be put in place or revised, as the case may be.

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 2005 the UK 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 principle shopping frontages for all the Borough's centres.

3.0 HAVANT TOWN CENTRE

3.1 Havant Town Centre is a compact former market town, which has evolved around the crossroads formed by West Street, South Street, East Street and North Street. Prior to 1982, the old coach road from Portsmouth to Chichester passed through the shopping centre. In 1982 the central section of West Street was closed to through traffic and pedestrianised. The primary shopping frontages lie along the pedestrian precinct and it is here where the greatest pedestrian flows are recorded. The Centre Report 1 lists nine key retail attractors which are represented in the town centre. Boots, Clarks, New Look and Superdrug occupy shops located along the pedestrianised section of West Street. Waitrose have a store in North Street and Tesco occupy a superstore in an edge-of-centre location in Solent Road. The three remaining key attractors Wilkinsons, Argos and W H Smith are located in the Meridian Centre. The Meridian Centre, also part of the primary shopping area, is a purpose-built enclosed shopping centre with decked parking above accommodating 380 spaces. As part of the Meridian Centre development a multi-storey car park has been constructed south of West Street accommodating 400 spaces. There are also 5 public off-street surface level car parks with spaces for 482 cars. There are charges for all these car parks.

3.2 In total the town centre contains 189 units with a gross floorspace of 36,975 sq m (398,000 sq ft). Convenience retailers occupy 7.4% of all units and non-food Class A1 retailers 57.1%. Service and vacant units comprise the remaining 35.5%. All retail categories are represented with the exception of retailers selling gifts, china, glass and leather goods. (Tables 1 and 2)

3.3 The Javelin Retail Research Group2 provide an up-to-date ranking of UK shopping centres based on scale, market position and retail offer. The latest scoring ranks Havant 494th. Nearby competing centres are ranked as follows: Southampton 12th, Portsmouth 74th, Chichester 115th, Fareham 203rd, Waterlooville 274th, Cosham 421st, Southsea 487th, Gunwharf Quays 488th and North End 678th.

Non Food Market Share

3.4. Since 1999 Havant's non-food market share has steadily declined from 16.3% to 13.2% in 20033 representing a 19% fall over 4 years. This decline can be partly attributable to Waterlooville's improvement and to the lack of major new shopping developments in and around Havant Town Centre. Waterlooville has increased its trade draw from the Eastern Catchment (all wards east of the A3(M)) and conversely fewer residents from the western catchment (all wards west of the A3(M)) are visiting Havant Town Centre. A retail impact assessment carried out in 2000 forecast that Havant's market share would fall to 15% following the opening of the Dukes Walk Shopping Centre, the Hambledon Road Retail Park at Waterlooville and the re-building of Asda/Walmart Hypermarket. However the fall is sharper than that forecast because the assessment ignored the impact of Gunwharf Quays at Portsmouth and West Quay at Southampton.

Retail Representation

3.5 The primary shopping frontages are located along the pedestrianised sections of West Street and the southern section of North Street. The ground floor shopping malls within the Meridian Centre are also defined as primary frontages. The secondary locations comprise those frontages along West Street, west of Park Road

South, all of Market Parade and the northern section of North Street. The remaining shopping frontages located in East Street and South Street are defined as tertiary and are not surveyed for monitoring purposes. (Table 5)

3.6 Since the 2001 survey was carried out a slight fall in Class A1 retail representation has occurred within the primary frontages. In 2001 77% of all units were classified Class A1, but by 2005 this had fallen to 74% representing a 4% decline. This fall mirrors a similar fall in the public's perception rating of the centre for its range of shops, both food and non-food. Class A1 retail representation within the secondary frontages has remained unchanged at 63%.

3.7 Retail representation, by trade category for the town centre as a whole, shows convenience retailers are slightly under-represented compared to the UK average. However, when convenience representation is examined by floorspace, Havant exceeds the UK average by 26% as it includes the floorspace occupied by two of the town's largest retailers, Waitrose and Tesco. For comparison shops Havant matches exactly the UK average with (57%) of all units falling within this sector. The floorspace assessment shows that Havant falls just below the UK average due to the small size of shops, particularly those situated in the secondary locations.

Proportion of Vacant Shops/Units

3.8 The 2005 vacancy rate has been obtained from the Experian Goad survey conducted on 12 January 2005. The survey showed 21 units vacant out of a total of 189 representing an 11% vacancy rate. At the time the survey was undertaken the UK average stood at 10% and therefore Havant just fails to meet the local plan monitoring target. Table 6 sets out the vacancy rate for the last 6 years and the 2005 figure shows a considerable fall in Havant's vacancy profile since 2001when 34 units (17% of total units) were recorded as vacant.

Public Perception Ratings

PUBLIC PERCEPTION RATING SCORES 2001 AND 2003

Indicator	2003 Score	2001 Score	% Change + or -
Range of Shops Food	27.2	30.4	-10.5
Range of Shops Non-Food	11.6	15.8	-36.0
Total Combined	38.8	46.2	-16.0

3.9 The table above shows that the public's perception of food and non-food shopping facilities declined by 16% between 2001 and 2003. This is a reflection of the lack of improvement in the retail offer of the centre. The centre's headline rating3 also declined by 2% whereas all the Borough's centres, with the exception of Leigh Park, improved their headline ratings over the same period. Table 7 shows that all the 5 shopping indicators were poorly rated. Residents gave a below average rating for the range of non-food shops and the price and quality of goods. The lowest rating was given to the range of restaurant and fast food facilities and this correlates with the Experian Goad Centre Profile which shows this service category under represented. On the up-side the centre does score heavily for its range of recreational facilities. The leisure centre and swimming pool are within walking distance of the centre.

However the high index rating of 271 has more to do with the lack of recreational facilities at other shopping centres in the Borough.

3.10 Where the centre does score highly is in the area of transportation. The centre has an above average score for car parking and accessibility. The residents perceptions on the issue of car parking have been confirmed by a parking survey carried out in May 2004 to determine the level of surplus car parking spaces available during the peak shopping hours on a Friday and Saturday.4 The survey recorded that out of a total of 1,262 off-street car parking spaces, 604 spaces were available on Friday and 700 on Saturday. The centre is also particularly highly rated for its bus and train facilities. Both the bus station and train station are in highly accessible locations relative to the shopping core. Havant is the only shopping centre in the Borough which possesses both a train and bus station.

3.11 Despite possessing a conservation area and an attractive precinct and public park, Havant scores low for its appearance and character. This low rating is likely to be mainly attributable to the poor appearance of the peripheral vacant sites on the edge of the centre, namely at Potash Terrace and Park Road South. These are gateway sites and give a poor impression to visitors approaching the town centre from the north or south. In addition, there are other parts of the centre that would benefit from redevelopment or refurbishment, principally Market Parade and the northern part of North Street. The former Dittman and Malpas store has been redeveloped in West Street and the Homewell Builders' Yard has been redeveloped for sheltered housing. The vacant and derelict offices above North Street Arcade have been converted to flats and this has improved the appearance of this part of the centre. None of these developments had commenced when the 2003 shopping survey was undertaken and the qualitative improvements they have brought to the shopping centre are not reflected in the perception ratings.

Pedestrian Flows

3.12 When the 2002 survey was undertaken an additional station point was added (Meridian Centre, West Street Entrance) therefore a direct comparison with the survey conducted in 2000 cannot be made. Comparisons can only be made between 2002 and 2004 when the last survey was undertaken. In 2002 the WEN (Weekly Equivalent Number) for all 6 station points amounted to 142,445 persons. The count taken taken in 2004 showed a drop of 5.5% to 134,550 persons. The least pedestrian flows were recorded at Iceland (16-18 Market Parade) where a 21% fall in pedestrian flows were recorded between 2002 and 2004. (Table 8)

Rents

3.13 The average rent for premises situated along the 100% pitch (where the highest pedestrian flows are recorded) in West Street has increased from £323 per sq m (£30 per sq ft) in March 1999 to £484 per sq m (£45 per sq ft) in May 2004. This rent relates to the primary frontages in West Street where the highest rents have been achieved and show a rise of 50% between 1999 and 2004 in line with the local plan monitoring target. However, this rise is not peculiar to Havant as most shopping centres in the UK achieved rises in response to the increased consumer confidence leading to increased retail sales.

Street Market

3.14 Street markets are not monitored for the purposes of assessing vitality and viability due to their essentially transitory nature. However, on the days they take place, it is generally considered they increase footfall and add vitality. Havant holds a market on Tuesdays and Saturdays and are generally supported by retailers. It has been suggested that the ambience of the market could be improved by renewing the canopies and standardising the size of stalls.

CONCLUSIONS

3.15 This assessment shows that Havant has declined since the last assessment was carried out in 2001, when it was concluded that the centre was in a reasonable state of economic health. In summary four of the six key performance indicators show downside trends as follows:

Non-food market share

This important indicator has shown the greatest decline with a 19% fall.

Public perception

There has been a decline of 16% in the public's perception of the centre's food and non-food shopping facilities.

Pedestrian flows

There has been a 6% fall in pedestrian flows for the centre as a whole.

Retail representation

Whilst the centre's profile in relation to the UK average holds up well and there has been a 4% decline in Class A1 retail representation within the primary frontages.

3.16 One indicator can be considered to be neutral as follows:

Vacancy rate

The vacancy rate has shown a considerable improvement since 1999 but it remains 9% above the UK average.

3.17 One indicator shows an upside trend as follows:

Rental tone

Between 1999 and 2004 headline Zone A rents have increased by 50% within the primary frontage at the 100% pitch.

3.18 The problems that Havant Town Centre now faces are being addressed through a combination of planning policy initiatives and town centre management strategies. The HBDWLP which was adopted on 30 September 2005, includes policies and proposals aimed at enhancing the centre's vitality and viability in accordance with the principal policy TC2 (Maintenance and Enhancement of Centres). This policy encourages development which will contribute to the town centres vitality and viability. Whilst many types of development can increase the strength of the centre, it is retail development in particular that will increase market share by attracting more of the expenditure that is generated within the Borough. In this connection site specific proposals HTC1 (Potash Terrace and Associated Land) and HTC4 (Development Site -North of Solent Road) will bring forward new retail development designed to accommodate national multiple retailers not currently represented in the centre. Planning permission has now been granted for the development of these sites subject to planning obligations made under Section 106 of the Town and Country Planning Act 1990 which prohibits lettings in the first instance to existing town centre retailers. Together these sites will provide 113,433 sq m (141,591 sq ft) gross of additional comparison floorspace. Once these are fully let, it is expected that this will raise Havant's profile and increase its market share of expenditure generated within the Borough from its current level of 13.2% to 18.0%. Both these schemes are designed to improve pedestrian linkage to the heart of the town centre and this will encourage linked shopping trips which will be to the benefit of existing shops and businesses.

3.19 Whilst these major retail developments will help improve the visual appearance of the centre by removing the derelict buildings on the gateway sites, small scale physical improvements will also help maintain vitality and viability and make the centre a more attractive place to visit for shopping and other purposes. Work is currently in hand to deliver environmental enhancement schemes through the Government's Liveability programme for which £300,000 has been set aside for specific projects.

3.20 The longer-term issue of redevelopment and refurbishment is being addressed by the urban design framework for the town centre as a whole, which is currently being prepared. This will provide a blueprint for the physical renewal of the town centre. It will make specific recommendations with regard to the possible redevelopment of Market Parade and for the vacant sites along Park Road South including smaller scale proposals for improving the physical appearance of the town centre.

3.21 The policies and proposals of the local plan and the urban design framework will be supplemented by town centre management initiatives. In this connection the Council is considering taking part in a national project known as the AGORA Pilot – New Solutions for Town Centre Management being piloted by the Association of Town Centre Management and Manchester Metropolitan University. This project is intended to promote good practice in the formation of business partnerships which would support the regeneration of town centres. The Council's own Regeneration Strategy included a target to implement a retail support strategy by 2006 and to establish a Business Improvement District in the Borough by 2008.

3.22 This twin track approach to town centre regeneration will help stem the decline described in the assessment. It will build upon the town centres existing strengths and opportunities which will enable it to compete more effectively in the wider retail hierarchy.

4.0 WATERLOOVILLE TOWN CENTRE

4.1 Waterlooville Town Centre, together with its residential catchment area, are both creations of the post-war development boom. Whilst a settlement has existed around the crossroads since the 18th century, the town centre expanded to meet the needs of the new residential neighbourhoods built after the war. Through-traffic was diverted from the town centre when the A3 (M) motorway opened in 1980 and the northern end of London Road was pedestrianised in 1985. Two small pedestrian precincts were constructed during the 1970s, one located on the west side (the Wellington Way precinct) and the other on the east side (The Precinct), which links London Road to the new Dukes Walk Shopping Centre.

4.2 The Centre Report5 lists eight key retail attractors, four of which, Boots, Clarkes, Superdrug and Woolworths are located along the pedestrianised section of London Road. Three of the remaining key attractors, New Look, Wilkinsons and Waitrose are located in the Dukes Walk Shopping Centre and the remaining key attractor, Dorothy Perkins is located in the open section of London Road.

4.3 The primary shopping frontages lie along the pedestrianised section of London Road and include the two precincts, Wellington Way and The Precinct. The primary frontage has now been extended to include Dukes Walk, as it contains a high number of national multiple retailers. The Dukes Walk Shopping Centre also provides a privately controlled shoppers car park of 200 spaces. The two other major car parks are also privately controlled, 600 spaces by Asda, who occupy the town's largest supermarket and 550 spaces within the Hambledon Road Retail Park which sits on the north side of Maurepas Way but is linked to the town centre by a pedestrian subway.

4.4 In total, the town centre contains 167 units with a gross floorspace of 40,046sq m (431,000sq ft). Convenience retailers occupy 5.4% of all units and non-food Class A1 retailers, 62.3%. Service and vacant units comprise the remaining 32.3%. All retail categories are represented with the exception of retailers selling men's and boy's wear. (Tables 3 and 4)

4.5 The 2001Survey by Javelin Retail Research Group, ranked Waterlooville at 395th position in its UK Survey but its current ranking now stands at 274th. The scores of nearby competing centres are set out in para 3.3.

Non-food Market Share

4.6 Whilst Commercial Road, Portsmouth remains the most visited shopping centre for Havant's residents, its trade draw from the Borough has declined since the shopping surveys conducted by the Council were first undertaken in 1995. It is Havant's centres, particularly Waterlooville Town Centre, which have benefited from the trade loss by Commercial Road. The increase in Waterlooville's market share from 16.5% in 2001 to 19.8% in 2003, can be directly attributable to the expenditure clawed back from Portsmouth which has now gone to the new retail floorspace provided by Dukes Walk and the Hambledon Road Retail Park. Both these developments are fully let and therefore contribute to town centre vitality and viability. The growth in Waterlooville's market share was anticipated as it was expected that these schemes would attract trade previously taken by competing centre, particularly Commercial Road.

Retail Representation

4.7 The primary frontages are located along the pedestrianised section of London Road except for the northern-most parades, which are defined as secondary. Both the two shopping precincts, Wellington Way and The Precinct, are also defined as primary locations. All the frontages in the Dukes Walk Shopping Centre are defined as primary. Most the open section of London Road (South) is defined as secondary, including the shopping frontages of St. George's Walk and Stakes Hill Road. The shops at the southern end of London Road are defined as tertiary but are not surveyed for monitoring purposes. (Table 8)

4.8 Since the 2001 survey was carried out, a small fall in Class A1 retail representation has occurred within the primary frontages. In 2001 84% of all units were classified A1 but by December 2004 this had fallen to 83% representing a 1.2% decline. This is considered to be insignificant in terms of the town centres overall vitality and viability. Class A1 representation remains well above the baseline threshold of 60% Class A1 representation which policy TC8 (Changes of Use – Primary Frontages) seeks to protect. Class A1 representation in the secondary locations has also fallen but by a greater amount from 62% in 2001 to 54% in 2005 amounting to a 12% decline overall.

4.9 Retail representation, by trade category for the town centre as a whole, shows that convenience retailers are under-represented compared to the UK average. However, like Havant, when convenience representation is examined by floorspace, Waterlooville exceeds the UK average by 50%, as it includes the floorspace occupied by the town centre's largest retailers, Waitrose and Asda. For comparison shops, Waterlooville exceeds the UK average with 62% of all units falling within this sector. The floorspace assessment shows that Waterlooville has a greater proportion of larger shop units than the UK average due to the size of the relatively modern units located in the London Road Precinct and Dukes Walk.

Proportion of Vacant shops

4.10 The vacancy rate for Waterlooville is based on the Experian Goad survey conducted on 21 December 2004. This survey showed that 10 units were vacant out of a total of 167 units representing a 6% vacancy rate. At the time the survey was undertaken the UK vacancy rate stood at 10% and therefore Waterlooville meets the Local Plan target of meeting/exceeding the UK average. Table 6 sets out the vacancy rate for the centre over the last 6 years and shows the rise in vacancy levels associated with the construction of the Dukes Walk Shopping Centres which was completed in 2000. The short term rise in during 2001 and 2002 coincided with the marketing of the scheme before all the new units were let.

Public Perception Ratings

PUBLIC PERCEPTION RATING SCORES 2001 AND 2003

Indicator	2003 Score	2001 Score	% Change + or -
Range of Shops Food	35.1	40.8	-14.0
Range of Shops Non-Food	2 6.9	18.2	+48.0

Indicator	2003 Score	2001 Score	% Change + or -
Total Combined	**62**	**59**	**+5.1**

4.11 The table above shows that the public's perception of shopping facilities increased by 5.1% between 2001 and 2005. This improvement has been driven by the 48% increase in the public's perception of non-food shopping i.e. comparison shopping. The rise is directly attributable to the opening and full occupation of the Dukes Walk Shopping and the Hambledon Retail Park. These schemes have provided good quality units which have been occupied by national multiple retailers particularly fashion retailers, not previously represented in the town centre. The fall in the rating for food shopping is likely to be related to the closure of the Kwik Save Supermarket and before that the closure of the small Tesco store in the London Road Precinct. Food shopping has been enhanced by the opening of the Waitrose store which anchors the Dukes Walk Shopping Centre. This store caters for the high value section of the bulk food shopping market. The public's perception of food shopping correlates with the Experian Goad index which shows all convenience trades poorly represented compared with the UK average despite the fact that the centre's floorspace index is above the UK average. The only other national multiple represented in the centre is Iceland, who occupy the largest unit in The Precinct. There is room to widen the convenience offer but this is more likely to be take up by independent retailers rather than by national multiples.

4.12 The centre also scores highly for moving around on foot and for freedom from traffic noise and fumes. This is to be expected as the centre possesses extensive traffic-free areas which enables pedestrians to shop in safety and comfort. Residents also consider the centre to offer above average recreational facilities although this comment has more to do with the facilities provided at the Waterlooville Leisure Centre at Brambles Farm rather than actual facilities provided in the town centre. The centre scores below average in the area of transportation and car parking. Access by car, access by bus, access by cycle, access by foot and car parking are all given below-average scores by residents. This is because the town centre is partly cut-off from its adjoining residential areas by Maurepas Way and Hulbert Road. There are three sections of Maurepas Way where pedestrian access to the town centre is made totally subservient to the needs of traffic and requires pedestrians to use unattractive subways. These highway arrangements also affect the ability of cyclists to access the town centre. All the centre's car parks are full at peak periods.

4.13 The lowest public perception ratings were given to the appearance and character and public toilet facilities. The lowest score for public toilet facilities is self-explanatory as there are only 2 public conveniences in the town centre and they are located in fringe positions. With regard to appearance and character, the most visually dominant part of the centre is the London Road Precinct, which is flanked by shops of indifferent architectural qualities built in a modernist flat-roof style popular in the sixties. Overall the centre lacks a discernible architectural theme and the fact that there are no buildings of architectural or historic interest is evidence in itself of its indifferent architectural quality. The most prominent modern building in the centre is St George's Church which is pleasantly complemented by its landscape setting.

Pedestrian Flows

4.14 The 100% pitch in Waterlooville Town Centre is located outside Woolworth's (304/306 London Road). It is the busiest location in the town centre and has remained so since pedestrian flows were first recorded in 1996. The lowest flow was recorded outside Ellys (248 London Road). Pedestrian movement at this point of the town centre is only 20% of the flows outside Woolworths. In 2002 the WEN for all six station points amounted 123,123 persons. The count taken in 2004 showed 9.9% decline to 110, 974 persons.

Rents

4.15 The average rent for premises situated along the 100% pitch in London Road has increased from £323 per square metre (£30 per square foot) in March 1999, to £430 per square metre (£40 per square foot) in May 2004. However, whilst pedestrian flows are lower along the Dukes Walk frontages, it is here that the highest Zone A rents have been achieved in the order of £484 per square metre (£45 per square foot). For monitoring purposes, it is the rise in London that is important as the Dukes Walk Shopping Centre was not built when the March 1999 survey was undertaken. The rise along the primary location in London Road amounts to 33% in line with the local plan monitoring targets.

Street Markets

4.16 The market is generally considered to be successful and has increased footfall on the day it operates (Fridays). However, there is concern that the appearance of the stalls has deteriorated over time and that the displays are a little drab. There are also concerns that the walkways between stalls are not always kept clear and the parking of traders' vans unattractive and need to be addressed.

CONCLUSIONS

4.17 This assessment shows that Waterlooville has continued to improve since the last assessment was carried out in 2001 when it was considered that the centre was in a good state of economic health. In summary, 4 of the 6 key performance indicators show upside trends as follows:

Non-Food Market Share

This important indicator has shown a further increase with a rise of 20%.

Public Perception

There has been a rise of 5.1% in the public's perception of the centre's food and non-food shopping facilities.

Vacancy Rate

The vacancy rate of 6% remains well below the UK average of 10% and shows a 40% drop from the figure recorded in 2001.

Rental Tone

Between 1999 and 2004 headline Zone A rents have increased by 33% within the primary frontages at the 100% pitch.

One indicator can be considered neutral as follows:

Retail Representation

A slight drop of 1.2% Class A1 representation within the primary frontages has occurred since 2001.

One indicator shows a downward trend as follows:

Pedestrian flows

There has been a 9.9% fall in pedestrian flows in the centre as a whole.

4.18 The evidence gained from this latest survey shows that Waterlooville can be be considered a vital and viable town centre. Both the Dukes Walk Shopping Centre and the Hambledon Retail Park have been developed with the objective of promoting vitality and viability. This is in accordance with the Government's objective that development should be focused in existing centres, in order to strengthen, and where appropriate, regenerate them. (Para. 2.1 PPS6).

4.19 Whilst the health of Waterlooville has improved recently it will remain vulnerable to trade diversion from competing centres, particularly higher order centres like Portsmouth city centre. It is essential, therefore, that the Council continues to support the role of the town by encouraging appropriate development, refurbishment and enhancement in accordance with policies TC1 – Hierarchy of Centres and Policy TC2 – Maintenance and Enhancement of Centres. Enhancement schemes are promoted through TC2 and currently work is in hand to improve the northern gateway of the town centre under the umbrella of the Government's Liveability programme. This particular project estimated to cost £400,000 will create a more vibrant open space intended to draw pedestrian activity to the northern end of the London Road Precinct. This will involve laying new paving, new street furniture, amenity lighting, street trees and floral displays. A space will be created to enable street performances to be carried out.

4.20 In addition to the enhancement work proposed for the northern end of the London Road Precinct, construction work has now commenced along the southern section of London Road to enhance this part of the town centre in accordance with proposals included in the former 1995 Waterlooville Town Centre Action Area Plan. This section of London Road, immediately south of the crossroads at the Stakes Hill Road/ St George's Walk, still contains a significant amount of premises in Class A1 use including one of the centre's key attractors (para. 4.2). The shopping environment suffers from effects of through traffic, being physically divorced from the London Road Precinct. The closure of the crossroads to through traffic, with the exception of buses will have several benefits for the town centre. Firstly, the two sections of London Road would be unified and provide a safe pedestrian shopping environment, and secondly it will help to bring the focus of the town centre southwards back to its historic location. Physically integrating this part of the town centre with the main precinct will encourage greater pedestrian footfall and enable an extension of the street market.

4.21 The environmental enhancement schemes described above will enhance the physical appearance of the centre. However, major improvements to the centre can only be achieved by development or redevelopment. In this connection, an Urban Design Framework for the town centre was adopted by the Council in October 2004. Three key sites were highlighted where redevelopment would secure better integration and configuration of the main shopping areas within the town centre. The three areas highlighted are as follow:

- Existing Asda superstore, community centre and surface level car park
- Wellington Way Precinct and adjoining public car park
- Clock House Buiilding

4.22 These are considered to be short to medium term schemes which could be implemented during the next seven years. However, the scheme which stands the most realistic chance of being developed early on is the existing Asda Superstore because of its relationship to the Major Development Area (MDA) for 2000-3000 houses. These are to be constructed on the western side of the town centre. The intention is to integrate the MDA with the town centre and this is likely to require the bridging of Maurepas Way and the relocation of the existing Asda store. The relocation of Asda will enable the redevelopment of the existing store and the Urban Design Framework proposes that this should take the form of standard high street retail units in an open street format which will encourage pedestrian movement between the MDA and the town centre.

4.23 In summary, recent retail developments have enhanced the profile of the town centre and boosted its vitality and viability. Dukes Walk has provided much-needed space for national comparison good retailers not previously represented in the centre. The Hambledon Retail Park has also provided large units for retailers who normally seek space in out-of-centre retail warehouse parks. These schemes will continue to contribute to overall vitality and viability through the generation of linked shopping trips. The promotion of the town centre through a combination of environmental enhancement refurbishment and redevelopment will improve Waterlooville's market share. This will have the knock-on effect of increasing footfall, retail representation and the public's perception of the centre.

Footnotes

1 Experian Goad Centre Report for Havant Town Centre 2005

2 Rankings obtained from DPP's Retail Impact Assessment for Centres Portsmouth July 2005

3 Havant Borough-Wide Shopping Survey 2003 Background Paper 2/9

4 Mayer Brown Car Parking Survey 14/15 May 2004 – Proposed Retail Development, Potash Terrace, Havant Transport Assessment June 2004

5 Experian Goad Centre Report for Waterlooville Town Centre 2004

TABLE 1
HAVANT TOWN CENTRE SUMMARY REPORT - OUTLET COUNT

Retail Category	Outlet Count	Area % Profile	Base % Profile	Index
Convenience	**14**	**7.41**	**9.17**	**81**
Bakers	4	2.12	1.95	108
Butchers	1	0.53	0.81	66
Greengroceries and Fishmongers	1	0.53	0.72	73
Groceries and Frozen Foods	4	2.12	2.76	77
Off-Licences and Home Brew	1	0.53	0.71	74
CTN and Convenience	3	1.59	2.22	72
Comparison	**108**	**57.15**	**57.21**	**100**
Footwear and Repair	3	1.59	2.33	68
Mens and Boys Wear	1	0.53	1.35	39
Womens, Girls and Childrens	9	4.76	5.69	84
Mixed and General Clothing	5	2.65	3.36	79
Furniture, Carpets and Textiles	8	4.23	4.45	95
Books, Arts/Crafts, Stationers/Copy	8	4.23	4.48	94
Electrical, Home Ent. 'Phones and Video	6	3.17	4.94	64
DIY, Hardware and Household Goods	10	5.29	3.03	175
Gifts, China, Glass & Leather Goods	0	0.00	1.93	0
Cars, Motorcycles and Accessories	4	2.12	1.40	152
Chemists, Toiletries and Opticians	8	4.23	3.81	111
Variety, Department and Catalogue	1	0.53	1.12	47
Florists and Gardens	3	1.59	1.08	147
Sports, Toys, Cycles and Hobbies	5	2.65	2.71	98
Laundrettes and Dry Cleaners	2	1.06	1.03	103
Hairdressing, Beauty and Health	14	7.41	6.60	112
Travel Agents	6	3.17	1.86	170
Jewellers, Clocks and Repairs,	3	1.59	2.31	69
Charity, Pets and Other Comparison	12	6.35	3.73	170
Service	**38**	**20.11**	**21.37**	**94**
Restaurants, Cafes, Fast Food	18	9.52	13.15	72
Banks and Financial Services	12	6.35	4.62	138
Building Societies	1	0.53	0.69	77
Estate Agents and Auctioneers	7	3.70	3.58	103
Miscellaneous	**29**	**15.34**	**11.58**	**132**
Employment Careers, PO's and Info. Etc.	8	4.23	1.36	310
Vacant	21	11.11	10.22	109
GRAND TOTAL	**189**	**100.00**	**100.00**	

SOURCE:
1. Experian GOAD Centre Centre Report 12th January 2005.

NOTES:
1. **Area Count** – The number of outlets present in the trade category described.
2. **Area % Profile** – The number of outlets present in the trade category described, i.e. outlet count expressed as a percentage of the grand total of outlets in the centre.
3. **Base Percentage Profile** – The average for the trade category described as a percentage of the grand total of all retail outlets for 1,100 GB centres surveyed by Experian GOAD.
4. **Index** - A comparison of the centre's Area Percentage Profile again the GB Base Percentage Profile for the category described. A figure of 100 would be in accordance with the base GB average. Where the figure shown is less than 100, i.e. 80, the incidence of that trade category in the subject centre is only 80% of GB average. Conversely, if the index figure exceeds 100, any amount over 100 is the percentage by which the centre exceeds the GB average for the trade category shown.
5. For the purposes of assessing Class A1 retail representation, comparison retailers include laundrettes, dry cleaners, hairdressing, beauty & health and travel agents.

TABLE 2
HAVANT TOWN CENTRE SUMMARY REPORT - FLOORSPACE

Retail Category	Floorspace sq. ft	Floorspace sq. m	Area % Profile	Base % Profile	Index
Convenience	**85**	**7.90**	**21.36**	**16.88**	**126**
Bakers	4	0.37	1.01	1.03	98
Butchers	2	0.19	0.50	0.45	112
Greengroceries and Fishmongers	1	0.09	0.25	1.54	16
Groceries and Frozen Foods	71	6.60	17.84	12.07	148
Off-Licences and Home Brew	1	0.09	0.25	0.47	53
CTN and Convenience	6	0.56	1.51	1.33	113
Comparison	**215**	**19.98**	**54.03**	**57.83**	**93**
Footwear and Repair	5	0.46	1.26	1.65	76
Mens and Boys Wear	0	0.00	0.00	1.10	0
Womens, Girls and Childrens	16	1.49	4.02	4.75	85
Mixed and General Clothing	27	2.51	6.78	4.82	141
Furniture, Carpets and Textiles	17	1.58	4.27	5.08	84
Books, Arts/Crafts, Stationers/Copy	14	1.30	3.52	3.58	98
Electrical, Home Ent. 'Phones and Video	6	0.56	1.51	3.93	38
DIY, Hardware and Household Goods	33	3.07	8.29	5.15	161
Gifts, China, Glass & Leather Goods	0	0.00	0.00	1.02	0
Cars, Motorcycles and Accessories	11	1.02	2.76	2.19	126
Chemists, Toiletries and Opticians	30	2.79	7.54	4.00	188
Variety, Department and Catalogue	8	0.74	2.01	9.16	22
Florists and Gardens	1	0.09	0.25	0.48	53
Sports, Toys, Cycles and Hobbies	9	0.84	2.26	2.72	83
Laundrettes and Dry Cleaners	2	0.19	0.5	0.47	106
Hairdressing, Beauty and Health	12	1.11	3.02	3.17	95
Travel Agents	6	0.56	1.51	1.10	136
Jewellers, Clocks and Repairs,	4	0.37	1.01	1.00	98
Charity, Pets and Other Comparison	14	1.30	3.52	2.46	143
Service	**58**	**5.39**	**14.57**	**16.02**	**91**
Restaurants, Cafes, Fast Food	24	2.23	6.03	8.31	73
Banks and Financial Services	24	2.23	6.03	5.09	119
Building Societies	1	0.09	0.25	0.57	44
Estate Agents and Auctioneers	9	0.84	2.26	2.05	111
Miscellaneous	**40**	**3.72**	**10.05**	**9.23**	**109**
Employment Careers, PO's and Info. Etc.	7	0.65	1.76	1.26	140
Vacant	33	3.07	8.29	7.98	104
GRAND TOTAL	**398**	**36.99**	**100.00**	**100.00**	

NOTE:

The floorspace count figures should be read in the same way as outlet count figures.

SOURCE:

Experian Goad Centre Report, January 2005

TABLE 3

WATERLOOVILLE TOWN CENTRE SUMMARY REPORT - OUTLET COUNT

Retail Category	Outlet Count	Area % Profile	Base % Profile	Index
Convenience	**9**	**5.39**	**9.28**	**59**
Bakers	1	0.60	1.95	31
Butchers	1	0.60	0.81	74
Greengroceries and Fishmongers	1	0.60	0.72	83
Groceries and Frozen Foods	4	2.40	2.76	87
Off-Licences and Home Brew	4	0.60	0.71	84
CTN and Convenience	4	0.60	2.22	27
Comparison	**104**	**62.28**	**57.43**	**109**
Footwear and Repair	5	2.99	2.33	128
Mens and Boys Wear	0	0.00	1.35	0
Womens, Girls and Childrens	6	3.59	5.69	63
Mixed and General Clothing	4	2.40	3.36	71
Furniture, Carpets and Textiles	8	4.79	4.45	108
Books, Arts/Crafts, Stationers/Copy	8	4.79	4.48	107
Electrical, Home Ent. 'Phones and Video	10	5.99	4.94	121
DIY, Hardware and Household Goods	6	3.59	3.03	119
Gifts, China, Glass & Leather Goods	3	1.80	1.93	93
Cars, Motorcycles and Accessories	7	4.19	1.40	300
Chemists, Toiletries and Opticians	9	5.39	3.81	141
Variety, Department and Catalogue	1	0.60	1.12	54
Florists and Gardens	1	0.60	1.08	55
Sports, Toys, Cycles and Hobbies	8	4.79	2.71	177
Laundrettes and Dry Cleaners	1	0.60	1.03	58
Hairdressing, Beauty and Health	10	5.99	6.60	91
Travel Agents	4	2.40	1.86	129
Jewellers, Clocks and Repairs,	3	1.80	2.31	78
Charity, Pets and Other Comparison	10	5.99	3.73	160
Service	**43**	**25.74**	**21.58**	**120**
Restaurants, Cafes, Fast Food	16	9.58	13.15	73
Banks and Financial Services	14	8.38	4.62	182
Building Societies	1	0.60	0.69	87
Estate Agents and Auctioneers	12	7.19	3.58	201
Miscellaneous	**11**	**6.59**	**11.69**	**57**
Employment Careers, PO's and Info. Etc.	1	0.60	1.36	44
Vacant	10	5.99	10.22	59
GRAND TOTAL	**167**	**100.00**	**100.00**	

SOURCE:
1. Experian GOAD Centre Centre Report 21 December 2004

NOTES:
1. **Area Count** – The number of outlets present in the trade category described.
2. **Area % Profile** – The number of outlets present in the trade category described, i.e. outlet count expressed as a percentage of the grand total of outlets in the centre.
3. **Base Percentage Profile** – The average for the trade category described as a percentage of the grand total of all retail outlets for 1,100 GB centres surveyed by Experian GOAD.
4. **Index** - A comparison of the centre's Area Percentage Profile again the GB Base Percentage Profile for the category described. A figure of 100 would be in accordance with the base GB average. Where the figure shown is less than 100, i.e. 80, the incidence of that trade category in the subject centre is only 80% of GB average. Conversely, if the index figure exceeds 100, any amount over 100 is the percentage by which the centre exceeds the GB average for the trade category shown.
5. For the purposes of assessing Class A1 retail representation, comparison retailers include laundrettes, dry cleaners, hairdressing, beauty & health and travel agents.

TABLE 4

WATERLOOVILLE TOWN CENTRE SUMMARY REPORT - FLOORSPACE

Retail Category	Floorspace sq. ft	Floorspace sq. m	Area % Profile	Base % Profile	Index
Convenience	**109**	**10.13**	**25.29**	**16.88**	**150**
Bakers	1	0.09	0.23	1.03	23
Butchers	1	0.09	0.23	0.45	52
Greengroceries and Fishmongers	1	0.09	0.23	1.54	15
Groceries and Frozen Foods	102	9.48	23.67	12.07	196
Off-Licences and Home Brew	1	0.09	0.23	0.47	49
CTN and Convenience	3	0.28	0.70	1.33	52
Comparison	**228**	**21.17**	**52.9**	**57.83**	**91**
Footwear and Repair	8	0.74	1.86	1.65	112
Mens and Boys Wear	0	0.00	0.00	1.10	0
Womens, Girls and Childrens	13	1.21	3.02	4.75	63
Mixed and General Clothing	13	1.21	3.02	4.82	63
Furniture, Carpets and Textiles	16	1.49	3.71	5.08	73
Books, Arts/Crafts, Stationers/Copy	10	0.93	2.32	3.58	65
Electrical, Home Ent. 'Phones and Video	16	1.49	3.71	3.93	94
DIY, Hardware and Household Goods	52	4.83	12.06	5.15	234
Gifts, China, Glass & Leather Goods	4	0.37	0.93	1.02	91
Cars, Motorcycles and Accessories	11	1.02	2.55	2.19	117
Chemists, Toiletries and Opticians	18	1.67	4.18	4.00	104
Variety, Department and Catalogue	5	0.46	1.16	9.16	13
Florists and Gardens	1	0.09	0.23	0.48	49
Sports, Toys, Cycles and Hobbies	12	1.11	2.78	2.72	102
Laundrettes and Dry Cleaners	1	0.09	0.23	0.47	49
Hairdressing, Beauty and Health	27	2.51	6.26	3.17	197
Travel Agents	4	0.37	0.93	1.10	84
Jewellers, Clocks and Repairs,	3	0.28	0.70	1.00	68
Charity, Pets and Other Comparison	14	1.30	3.25	2.46	132
Service	**62**	**5.76**	**14.38**	**16.02**	**90**
Restaurants, Cafes, Fast Food	20	1.86	4.64	8.31	56
Banks and Financial Services	28	2.60	6.50	5.09	128
Building Societies	2	0.19	0.46	0.57	81
Estate Agents and Auctioneers	12	1.11	2.78	2.05	136
Miscellaneous	**32**	**2.97**	**7.42**	**9.23**	**93**
Employment Careers, PO's and Info. Etc.	0	0.00	0.00	1.26	0
Vacant	32	2.97	7.42	7.98	93
GRAND TOTAL	**431**	**40.03**	**100.00**	**100.00**	

NOTE:

The floorspace count figures should be read in the same way as outlet count figures.

SOURCE:

Experian Goad Centre Report, 21 December 2004

TABLE 5

HAVANT TOWN CENTRE CLASS A1 RETAIL REPRESENTATION

Primary/Secondary Units		
	No of Units	%
Primary	74	39
Secondary	91	48
Tertiary	24	13
Total	**189**	**100**

Retail/Non-Retail Units		
	No of Units	%
Primary		
Retail	55	74
Non-Retail	19	26
Sub Total	74	100
Secondary		
Retail	57	63
Non-Retail	34	37
Sub Total	91	100
Total	**165**	

Source:

1. Experian Goad Centre Plan 12 January 2005.

2. Primary and Secondary frontages taken from Revised Deposit Draft HBDWLP Inset Map for Havant Town Centre.

Note:

1. Retail is defined as a Class A1 Shop as specified in the Town and Country Planning (Use Classes) (Amendment) (England) Order 2005

2. The Experian Goad Centre Report includes an outlet count of 189 units. 24 units are located in tertiary frontages which are not monitored for the purposes of establishing Class A1 retail representation.

TABLE 6

HAVANT & WATERLOOVILLE TOWN CENTRES
VACANCY RATE COUNTS 1999 – 2005

	Havant Town Centre		**Waterlooville Town Centre**	
	Units	Profile Percentage	Units	Profile Percentage
1999	32	16	12	8
2000	24	12	9	6
2001	34	17	17	10
2002	32	16	9	5
2003	19	10	8	5
2004	20	11	7	4
2005	21	11	10	6

Sources:

1. Experian Goad Centre Reports 1999 – 2005.

Notes:

1. The Profile shows the proportion of vacant units relative to the total number of units in the Centre.

TABLE 7
HAVANT TOWN CENTRE
PUBLIC PERCEPTION RATING

Public Perception Indicators		**Percentage Havant**	**Percentage Borough**	**Index**
1	Range of Shops Food	27.2	31.2	87
2	Range of Shops Non-Food	11.6	14.6	79
3	Quality of Goods	23.0	33.1	69
4	Price of Goods	16.1	24.3	66
5	Access by Car	59.9	56.7	106
6	Car Parking	54.8	48.3	114
7	Access by Bus or Train	70.1	47.3	148
8	Access by Cycle	58.8	60.8	97
9	Access by Foot	64.8	75.3	86
10	Recreational Facilities	25.7	9.5	271
11	Restaurants/Fast Food Facilities	14.5	28.0	52
12	Moving around on foot	52.1	59.9	87
13	Appearance and Character	19.9	27.7	72
14	Freedom from Noise and Traffic Fumes	22.5	32.1	97
15	Personal Safety	21.5	28.0	77
16	Public Toilet Facilities	10.6	15.5	68
17	Opening House	23.5	30.4	77
18	Disabled Facilities	13.5	15.3	88
19	Facilities for Parents	12.0	11.2	107
20	Banks and Building Societies	58.1	49.8	117
21	Estate Agents and other Office Uses	54.9	55.0	100
	TOTAL RESPONSE	715.1		
	PERCEPTION RATING	**34.1**		

SOURCE:

1. Havant Borough-Wide Shopping Survey 2003 Tables 2 and 3.

NOTES:

1. The response percentage figures have been obtained from the tables, which set out results to the perception questions. This asked respondents to rate their chosen centre as either '*good*', '*average*' or '*poor*'. The percentage figures used indicate only the results of those respondents who indicated a '*good*' response.

2. The perception rating is obtained by dividing the total percentage response by a factor of 21, which is the total number of indicators listed in the table.

3. The index rating is obtained by aggregating the percentage scores for all the Borough’s centres and dividing the total by 6 to obtain the average. This illustrates the difference between a percentage figure for the centre and the Borough average. A figure of 100 would match exactly the average rating. Where a figure if less than 100 is scored, e.g. 80, the rating would be 20% below the Borough average. Conversely, if the index rating exceeds 100, any amount over 100 is the percentage by which a particular centre exceeds the Borough average for the performance indicator measured.

TABLE 8

HAVANT TOWN CENTRE PEDESTRIAN FLOW COUNTS

Station Point		W.E.N. 2004	Index 2004	W.E.N. 2002	Index 2002	W.E.N. 2000	Index 2000	W.E.N. 1996	Index 1996
A	MacDonalds 33 West Street	21,515	51.4	24,459	71.9	30,159	100	17,349	68.4
B	WHSmiths Meridian Centre	21,622	51.7	27,697	81.4	29,918	99.2	23,973	94.5
C	Iceland 16/18 Market Parade	6,851	16.4	8,617	25.3	11,212	37.2	12,020	47.4
D	Waitrose North Street	17,849	42.7	17,073	50.2	19,856	65.9	19,223	75.8
E	Currys 6 West Street	24,887	59.5	30,560	89.8	26,145	86.7	25,355	100
F	Meridian Centre West Street Entrance	41,826	100.0	34,039	100.0				
	TOTAL	**134,550**		**142,445**		**117,290**		**97,920**	

Notes:

1. The 2004 pedestrian survey was conducted on Friday 23 July and Saturday 24 July.
2. The count methodology was five minute counts taken at hourly intervals between 10.00am and 4.00pm at each station point.
3. The total location count for each of the two survey days is multiplied by a factor of twelve. The two days are then added together and multiplied by a factor of 2.23 to give a total Weekly Equivalent Number (W.E.N.).
4. Station point F (Meridian Centre, West Street Entrance) was included for the first time during the 2002 survey.
5. The index shows the level of flows relative to the busiest location i.e. the 100% pitch.

TABLE 9

WATERLOOVILLE TOWN CENTRE
CLASS A1 RETAIL REPRESENTATION

Primary/Secondary Units		
	No of Units	%
Primary	89	53
Secondary	54	37
Tertiary	24	14
Total	**167**	**100**

Retail/Non-Retail Units		
	No of Units	%
Primary		
Retail	74	83
Non-Retail	15	17
Sub Total	89	100
Secondary		
Retail	29	54
Non-Retail	25	46
Sub Total	54	100
Total	**143**	

Source:

1. Experian Goad Centre Plan 12 December 2004.

2. Primary and Secondary frontages taken from Revised Deposit Draft HBDWLP Inset Map for Waterlooville Town Centre.

Note:

1. Retail is defined as a Class A1 Shop as specified in the Town and Country Planning (Use Classes) (Amendment) (England) Order 2005
2. The Experian Goad Centre Report includes an outlet count of 167 units. 24 units are located in tertiary frontages which are not monitored for the purposes of establishing Class A1 retail representation.

TABLE 10
WATERLOOVILLE TOWN CENTRE
PUBLIC PERCEPTION RATING

Public Perception Indicators		Percentage W'looville	Percentage Borough	Index
1	Range of Shops Food	35.1	31.2	113
2	Range of Shops Non-Food	26.9	14.6	184
3	Quality of Goods	26.2	33.1	79
4	Price of Goods	25.5	24.3	105
5	Access by Car	52.0	56.7	92
6	Car Parking	34.4	48.3	71
7	Access by Bus or Train	37.3	47.3	79
8	Access by Cycle	42.3	60.8	70
9	Access by Foot	57.4	75.3	76
10	Recreational Facilities	12.5	9.5	132
11	Restaurants/Fast Food Facilities	25.9	28.0	93
12	Moving around on foot	63.4	59.9	106
13	Appearance and Character	16.8	27.7	61
14	Freedom from Noise and Traffic Fumes	31.7	23.1	137
15	Personal Safety	17.7	28.0	63
16	Public Toilet Facilities	6.6	15.5	43
17	Opening House	27.2	30.4	89
18	Disabled Facilities	11.8	15.3	77
19	Facilities for Parents	13.9	11.2	124
20	Banks and Building Societies	68.0	99.8	137
21	Estate Agents and other Office Uses	61.8	55.0	112
	TOTAL RESPONSE	694.4		
	PERCEPTION RATING	**33.1**		

SOURCE:

1. Havant Borough-Wide Shopping Survey 2003.

NOTES:

1. The response percentage figures have been obtained from the tables which set out results to the perception questions. This asked respondents to rate their chosen centre as either '*good*', '*average*' or '*poor*'. The percentage figures used indicate only the results of those respondents who indicated a '*good*' response.

2. The perception rating is obtained by dividing the total percentage response by a factor of 21, which is the total number of indicators listed in the table.

3. The index rating is obtained by aggregating the percentage scores for all the Borough's centres and dividing the total by 6 to obtain the average. This illustrates the difference between a percentage figure for the centre and the Borough average. A figure of 100 would match exactly the average rating. Where a figure if less than 100 is scored, e.g. 80, the rating would be 20% below the Borough average. Conversely, if the index rating exceeds 100, any amount over 100 is the percentage by which a particular centre exceeds the Borough average for the performance indicator measured.

TABLE 11

WATERLOOVILLE TOWN CENTRE PEDESTRIAN FLOW COUNTS

Station Point		W.E.N. 2004	Index 2004	W.E.N. 2002	Index 2002	W.E.N. 2000	Index 2000	W.E.N. 1996	Index 1996
A	Stationary Store 19 The Precinct	21,809	72.4	25,395	68.4	13,086	31.5	23,593	68.4
B	Animal Support 8 Wellington Way	19,374	64.3	16,939	45.6	17,876	43.0	22,924	66.5
C	McDonalds 318 London Road	11,079	36.8	14,879	40.1	25,877	62.3	14,584	42.3
D	Woolworths 304/306 London Road	30,132	100.0	37,143	100.0	41,532	100.0	34,476	100.0
E	Ellys Wine Store 248 London Road	5,834	19.4	7,493	20.2	8,429	20.3	7,783	22.6
F	KJC/New Look Dukes Walk	22,746	75.5	21,274	57.3				
	TOTAL	**110,974**		**123,123**		**106,800**		**103,360**	

Notes:

1. The 2004 pedestrian survey was conducted on Thursday 5 August and Saturday 7 August.
2. The count methodology was five minute counts taken at hourly intervals between 10.00am and 4.00pm at each station point.
3. The total location count for each of the two survey days is multiplied by a factor of twelve. The two days are then added together and multiplied by a factor of 2.23 to give a total Weekly Equivalent Number (W.E.N.).
4. Station point F (KJC/New Look, Dukes Walk) was included for the first time during the 2002 survey.
5. The index shows the level of flows relative to the busiest location i.e. the 100% pitch.